Arizona Department of Health Services

Bureau of Nutrition and Physical Activity

HANDS WIC System

Detailed Functional Design Document

Commodity Supplemental Food Program

January 5, 2016

Version 1.1

Table of Contents

REVISION HISTORY

The chart below indicates revisions made to this document:

Version	**Name**	**Brief Description of Change**	**Published**
1.0	Cecilia Romo-Thompson	Initial Draft	00-00-2014

1 OVERVIEW

This document is a detailed functional design document (DFDD) for the HANDS WIC System, concentrating on features associated with the available Commodity Supplemental Food Program (CSFP) features at the clinic level. The CSFP module can only be accessed by clinics that have CSFP set up in the System Administration.

1.1 Commodity Supplemental Food Program (CSFP) Features Summary

- Search for existing families/clients participating in CSFP
- Maintain family information
- Maintain client information
- Maintain income information for a participant
- Maintain certification information for a participant
- Maintain and update distribution information
- View appointment information for a family/participants
- View notes for participants
- Enroll a new family into CSFP
- Enroll a new client(s) into CSFP
- Record income for a family/participant(s) for CSFP
- Certify participants for the CSFP program
- Schedule appointments for a participant in CSFP
- Creates notes for a client record in CSFP

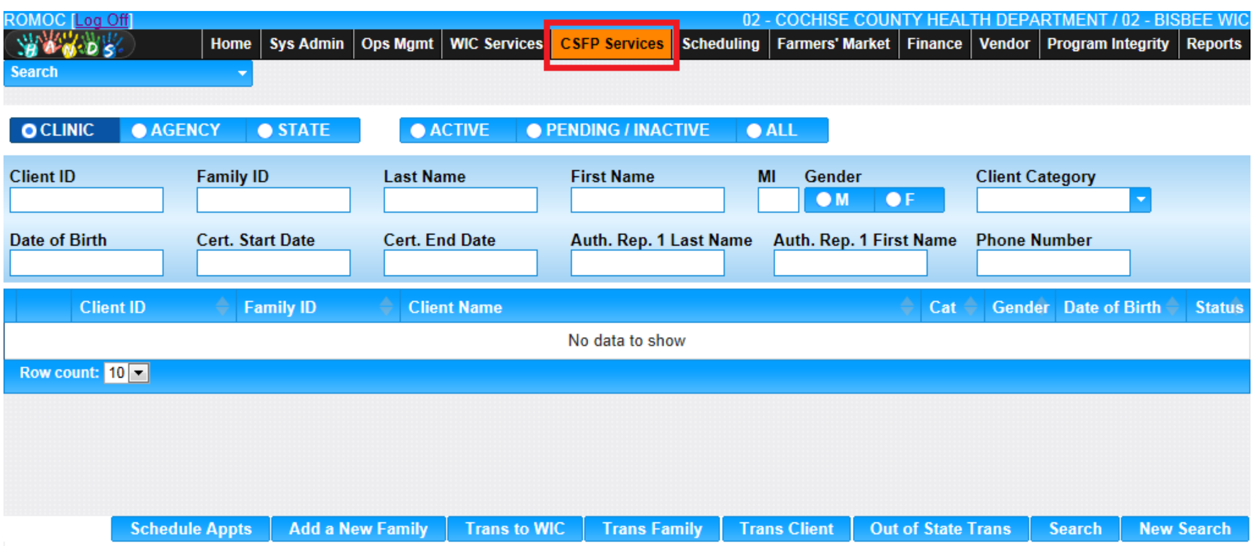


Figure 1: CSFP Services

2 CSFP SEARCH

The Search page allows searching for existing participants in the CSFP prior to entering new data into the system. The search page offers multiple options for search criteria and also allows the user to search their clinic, agency, or state for participants.

Navigation Path: CSFP Services | Search

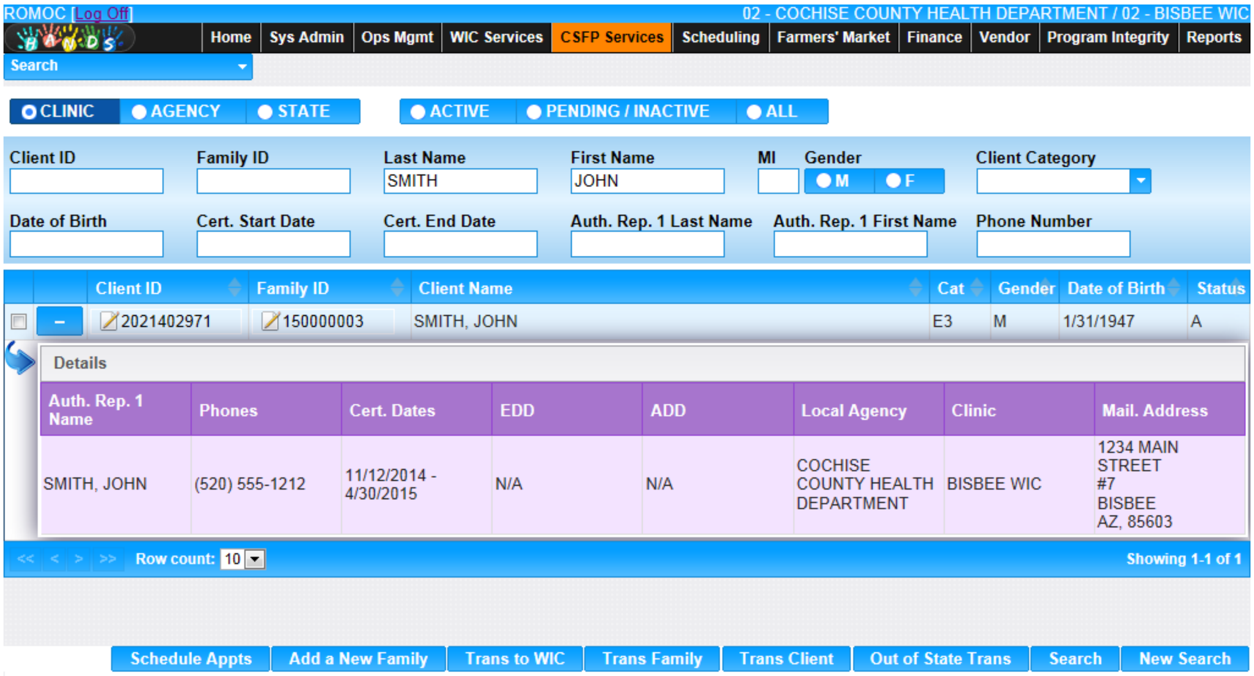


Figure 2: CSFP Search

Fields:

- **Client ID** – This field narrows the search results by Client ID
- **Family ID** – This field narrows the search results by Family ID
- **Last Name** – This field narrows the search results by client last name
- **First Name** – This field narrows the search results by client first name
- **MI** – This field narrows the search results by client middle initial
- **Client Category** – This drop down list narrows the search results by client category
- **Date of Birth** – This field narrows the search results by client date of birth
- **Cert. Start Date** – This field narrows the search results by the certification start date
- **Cert. End Date** – This field narrows the search results by the certification end date
- **Auth. Rep. 1 Last Name** – This field narrows the search results by the Authorized Representative 1 last name
- **Auth. Rep. 1 First Name** – This field narrows the search results by the Authorized Representative 1 first name
- **Phone Number** – This field narrows the search results by the phone number

Fields (Results Grid):

- **Client ID** – A unique, system generated identification number for the client. This field is displayed as a link that will navigate the user to the Client page. A symbol of a D will display next to this field for deceased clients.
- **Family ID** – A unique, system generated identification number for the family. This field is displayed as a link that will navigate the user to the Family page.
- **Client Name** – The name of the client listed by Last Name, First Name. This field is display only. The text in this field is bold and red for deceased clients.
- **Category** – The category that the client belongs to. This field is display only.
- **Gender** – The gender of the client. This field is display only.
- **Date of Birth** – The birth date of the client. This field is display only.
- **Status** – The status of the client. This field is display only.

Fields (Results Grid – Expanded Row):

- **Auth. Rep. 1 Name** – The name of the Authorized Representative 1 displayed by Last Name, First Name. This field is display only.
- **Phones** – The phone number for the authorized representative. This field is display only.
- **Cert. Dates** – The cert dates for the client. This field is display only.
- **EDD** – The Expected Delivery Date for the client (if applicable). This field is display only.
- **ADD** – The Actual Delivery Date for the client (if applicable). This field is display only.
- **Local Agency** – The local agency the client is registered in. This field is display only.
- **Clinic** – The clinic the client is registered in. This field is display only.
- **Mail. Address** – The mailing address for the family. This field is display only.

Checkboxes:

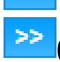
- **Clinic/Agency/State** – Selection options to search by clinic, agency, or statewide
- **Active/Pending/Inactive/All** – Selection options to search by active, pending, inactive, or all clients
- **Gender M/F** – Selection options to search by gender

Buttons:

- 

(Previous Page) – Show the previous page of results
- 

(Next Page) – Show the next page of results
- 

(First Page) – Show the first page of results
- 

(Last Page) – Show the last page of results
- 

Row Count – Expands the displayed rows in the search results (10, 25, 50)
- **Schedule Appts.** – Navigates to the Appointment Scheduler
- **Add a New Family** – Navigates to a blank Family page
- **Trans to WIC** – Initiates the process to transfer a selected client to the WIC program
- **Trans Family** – Initiates the process to transfer a selected family into the logged in clinic
- **Trans Client** – Initiates the process to transfer a selected client into the logged in clinic
- **Out of State Trans** – Initiates the out of state transfer process

- **Search** – Initiates a search based on the search criteria entered
- **New Search** – Clears all search criteria from the search fields

Calculation(s): None

Background Processes:

1) Searching by a phone number will return all Client records that match the phone number entered. The query will look at all numbers entered for families if multiple exist.
2) Users logged in at the State Agency or Local Agency level will be able to view all Client and Family records throughout the system in a "view only" state. Users logged in at the Clinic level will only be able to access those Client and Family records located in their Clinic. However, by using the Agency/Clinic/Statewide buttons the user will have access to all Client and Family records throughout the system.
3) For partial match searches, the 'wildcard' will be assumed on the end of the search. A "starts with" process will be on each field. If a query is executed and no matches are found, the criteria entered remains on the screen, the cursor remains in the criteria field, and the results section of the screen display a "No data to show" message. If no criteria are entered and the query is executed, the system retrieves all Clients in the database.

2.1 Transfer to WIC

Navigation Path: CSFP Services |Search | Trans to WIC Button

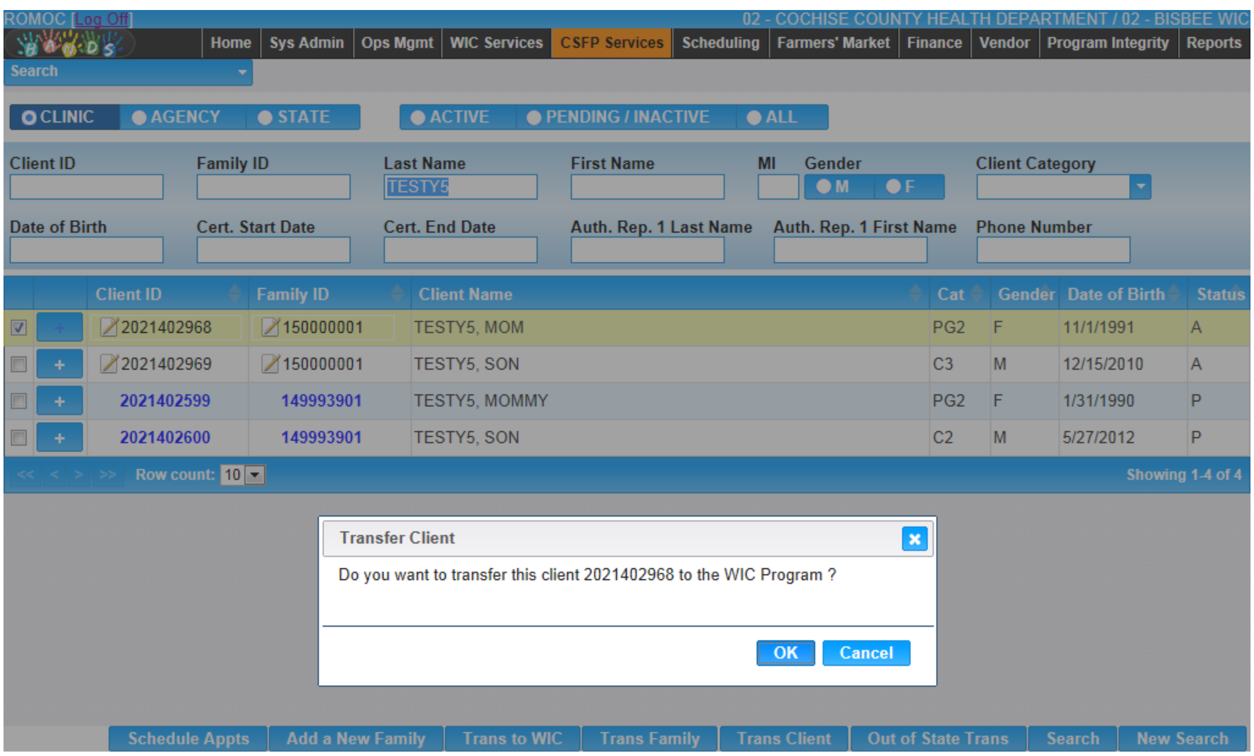


Figure 2.1: Transfer to WIC

Message Box Text:

- **Do you want to transfer this client <Client ID> to the WIC Program?**

Buttons:

- **OK –** The client is transferred to the WIC Program. The Confirmation notification appears.

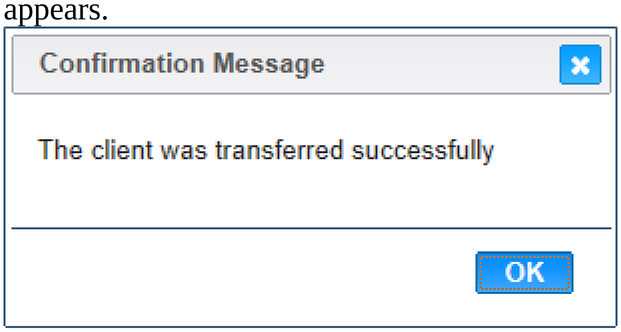


Figure 2.2: Transfer Confirmation Message

  - **OK** – The Confirmation notification is closed
  - **(Close Window)** – The Confirmation notification is closed

- **Cancel –** No action is taken
- **(Close Window) –** The window is closed and no action is taken

Calculation(s): None

Background Processes:

1) The Program code for the client will change from C to W.
2) If the client is certified in CSFP, then the certification will be terminated with the reason code '6 – CURRENTLY PARTICIPATING IN WIC'.

2.2 Transfer Family

Navigation Path: CSFP Services | Search | Trans Family Button

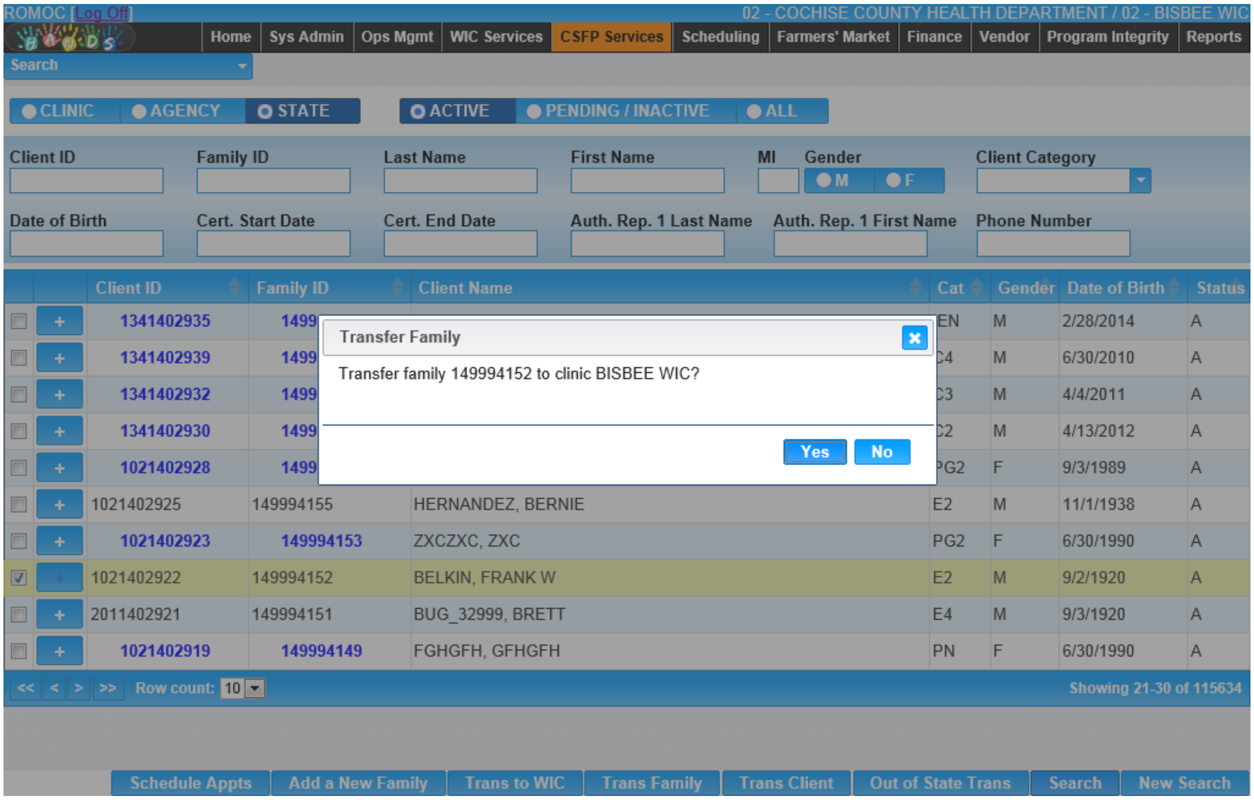


Figure 2.3: Transfer Family

Message Box Text:

- **Transfer family <Family ID> to clinic <Logged in clinic>?**

Buttons:

- **Yes –** Completes the family transfer

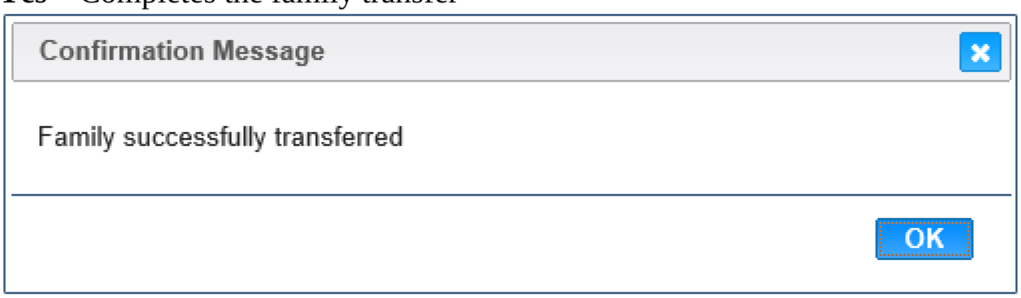


Figure 2.4: Transfer Family Confirmation Message

  - **OK** – The Confirmation notification is closed
  - **(Close Window) –** The Confirmation notification is closed
- **No** – Transfer is not completed
- **(Close Window) –** The window is closed and no action is taken.

Calculation(s): None

Background Processes:

1) All future appointments for clients in this family will be deleted.
2) Breast pump inventory record will be updated to have the new Clinic ID if any of the client(s) in this family has a breast pump with the status Issued or Letter Sent.
3) Client’s current breast pump issuance record, if any, will be updated to have new Clinic ID.

2.3 Transfer Client

Navigation Path: CSFP Services | Search | Trans Client Button

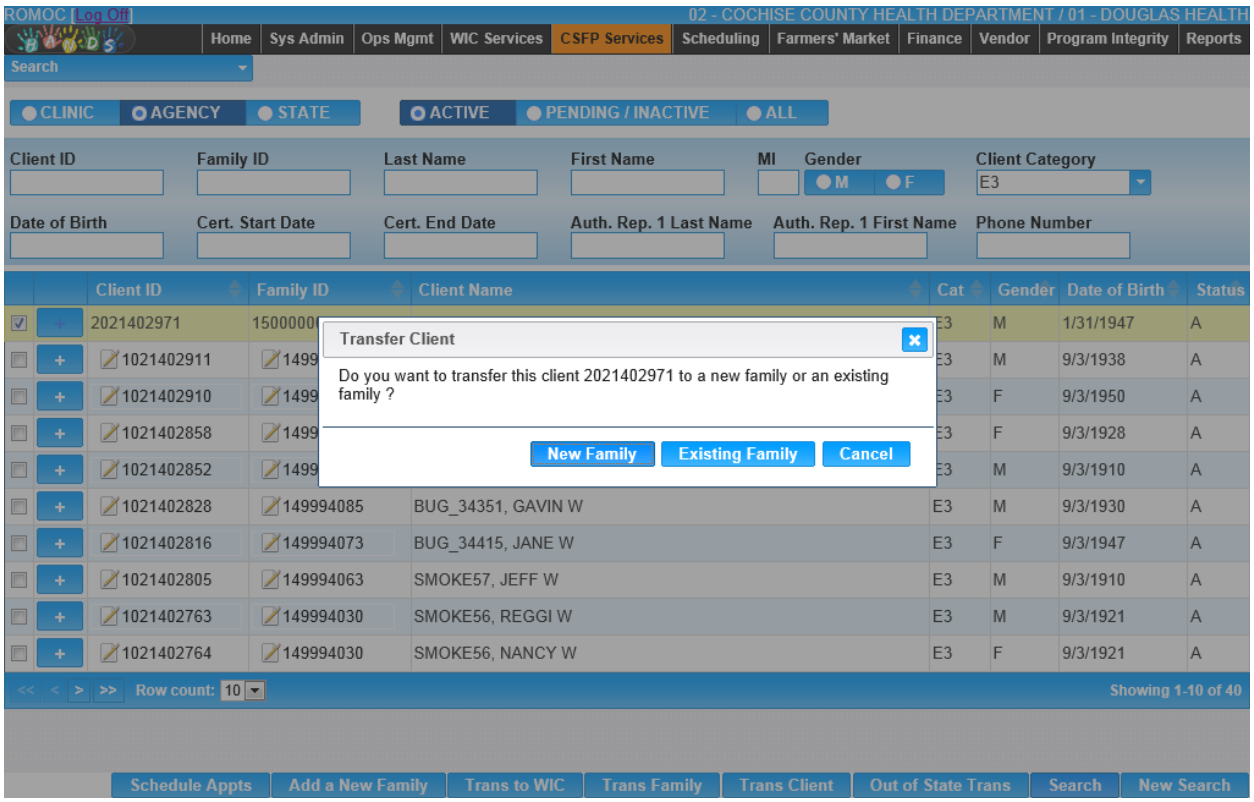


Figure 2.5: Transfer Client

Message Box Text:

- **Do you want to transfer this client <Client ID> to a new family or an existing family?**

Buttons:

- **New Family** – Initiates the process to transfer the client into a new family. A blank family page will display to enter the new family information.
- **Existing Family** – Initiates the process to transfer the client into an existing family

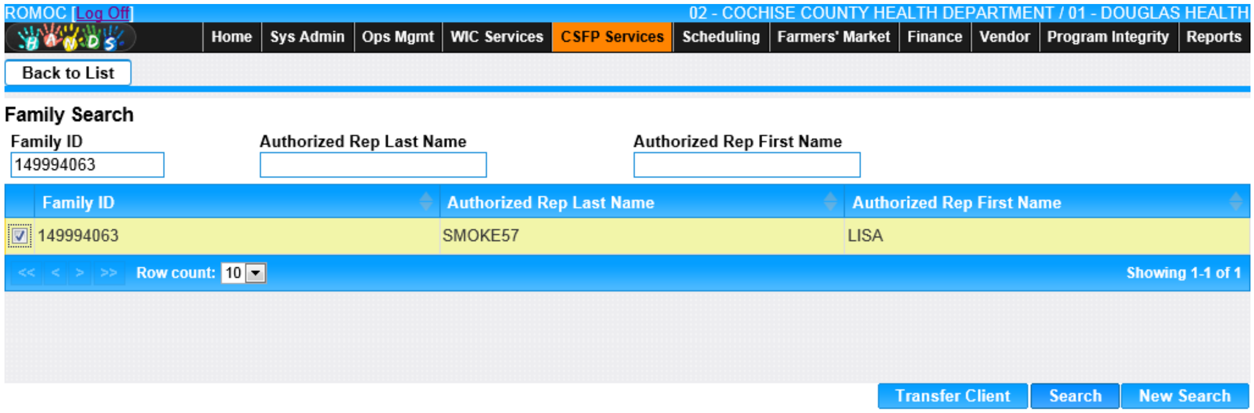


Figure 2.6: Family Search

- **Family ID -** This field will narrow down the search results by Family ID
- **Authorized Rep Last Name** – This field will narrow down the search results by Authorized Rep Last Name
- **Authorized Rep First Name** – This field will narrow down the search results by Authorized Rep First Name
- **Transfer Client** – Continues the client transfer process

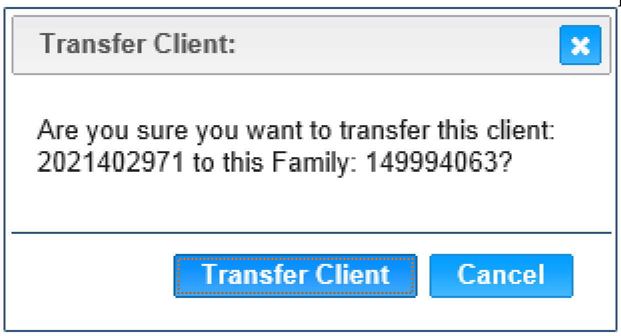


Figure 2.7: Transfer Client Message

- **Transfer Client** – Continues the transfer process

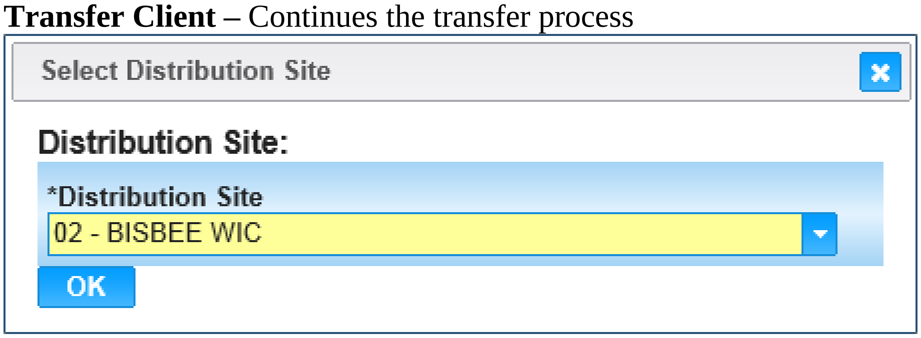


Figure 2.8: Select Distribution Site

- **Distribution Site** – List of CSFP distribution sites
- **OK** – Continues the transfer process

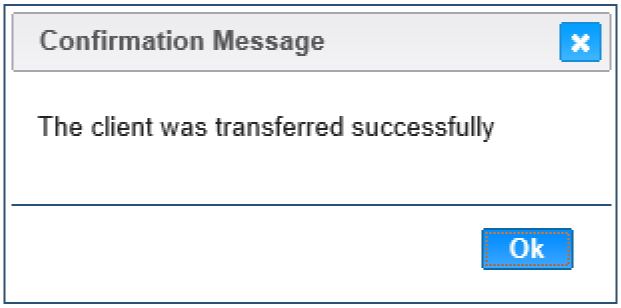


Figure 2.9: Transfer Confirmation Message

        - **Cancel –** Transfer process is cancelled
    - **Search –** Initiates the search based on the criteria entered
    - **New Search –** Clears all search fields

- **Cancel** – The window is closed and no action is taken
- **(Close Window) –** The window is closed and no action is taken.

Calculation(s): None

Background Processes:

1) Client income:
    - For foster clients: If transferred, the foster client is part of the previous family income record, new income history record will be created with the client's previous family income details.

    - For other clients: Client income details will be removed from previous family's income history record.

2) Client's future appointments will be deleted and client will be removed from any scheduled nutrition discussion groups.

2.4 Out of State Transfer

This page is used to transfer clients into the system from other states or to use an existing record from a client that was previously receiving services. Once the user is in the Out of State Transfer flow, all screens for all family members must be completed before navigating to another module. Once the user navigates to another module, they are no longer in the transfer flow and additional information may be required to add family members. In the Out of State Transfer flow, only the Family, Client and Certification pages are required.

Navigation Path: CSFP Services | Search | Out of State Trans Button

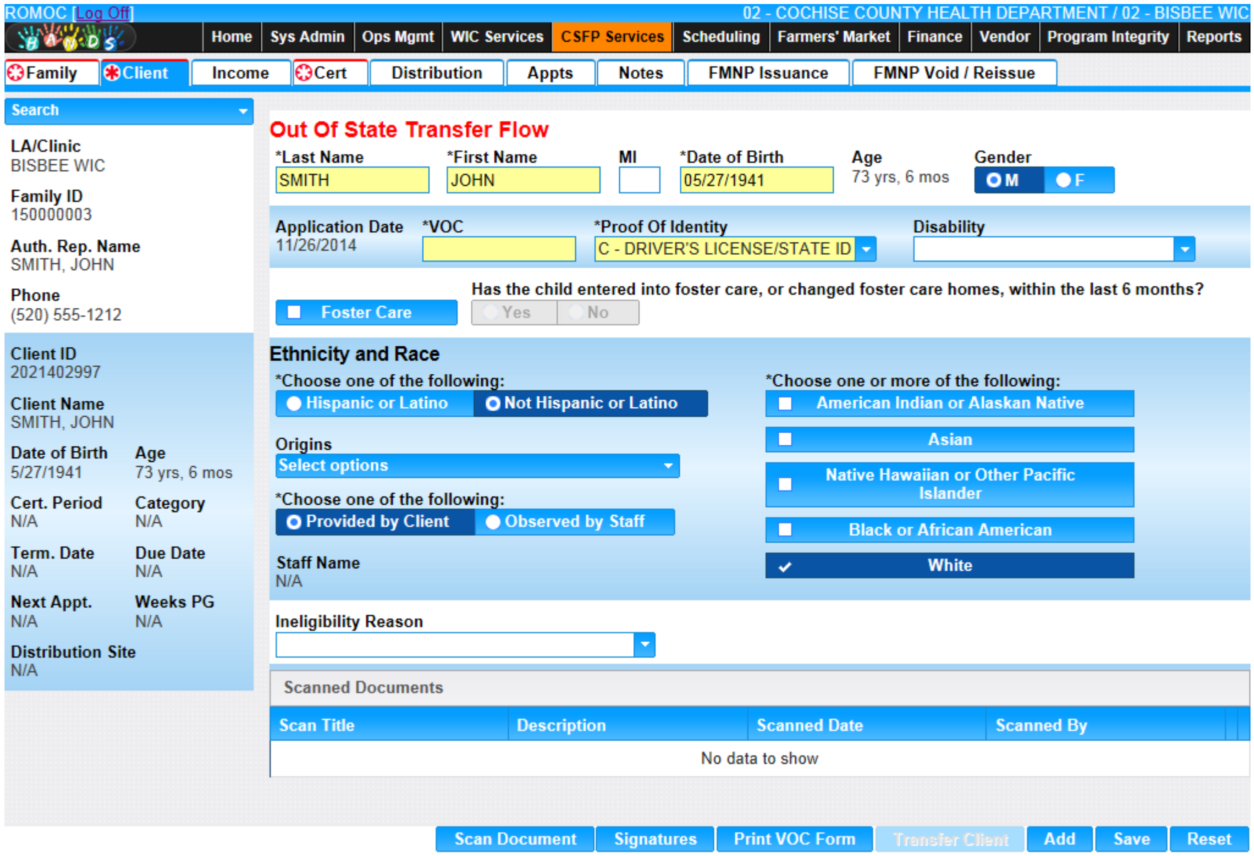


Figure 2.10: Out of State Transfer

NOTE: If the client the user is trying to do an out of state transfer for is not in the clinic the user is logged into, a message will display informing the user to first complete and in-state transfer.

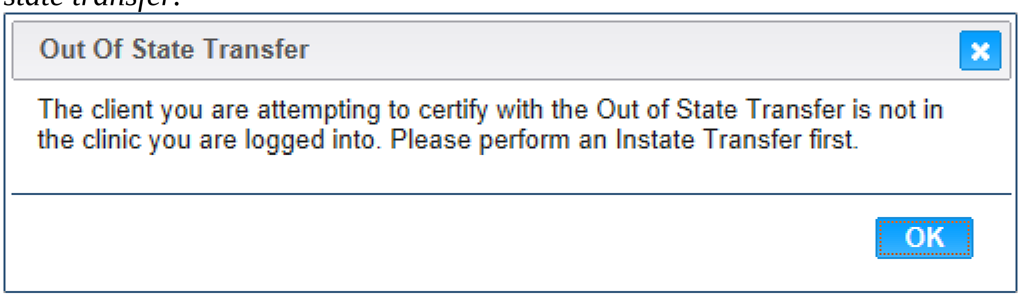


Figure 2.11: Out of State Transfer Message

If the client the user is trying to do an out of state transfer for is in an active certification, a message will display asking if they want to terminate the certification.

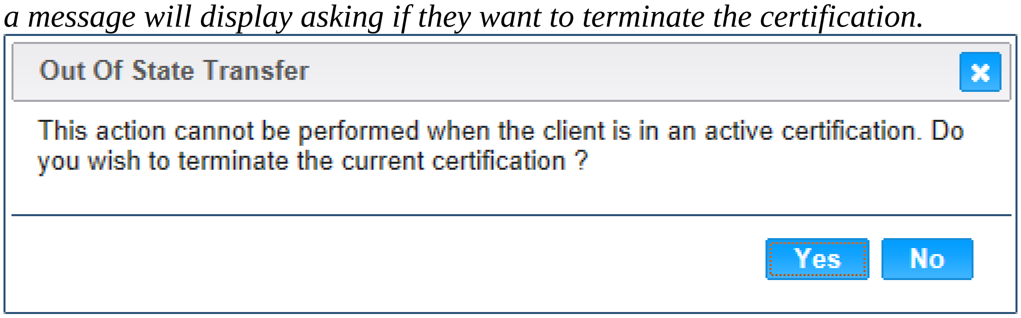


Figure 2.12: Out of State Transfer Message

Buttons:

- **Yes –** Terminates the current certification
- **No –** Keeps the current certification and no action is taken
- **(Close Window) –** The window is closed and no action is taken.

Calculation(s): None

Background Processes:

1) If the client has a valid current certification, it will be terminated and the client's record status is set to Inactive (I).
2) If any VOC value exists, it will be cleared from client's record.

3 FAMILY PAGE

The CSFP Family page is used to enter demographic information for a family, such as address and phone numbers. The completion and saving of this page will generate a unique Family ID for that family.

Navigation Path: CSFP Services | Add a New Family Button | Family Information

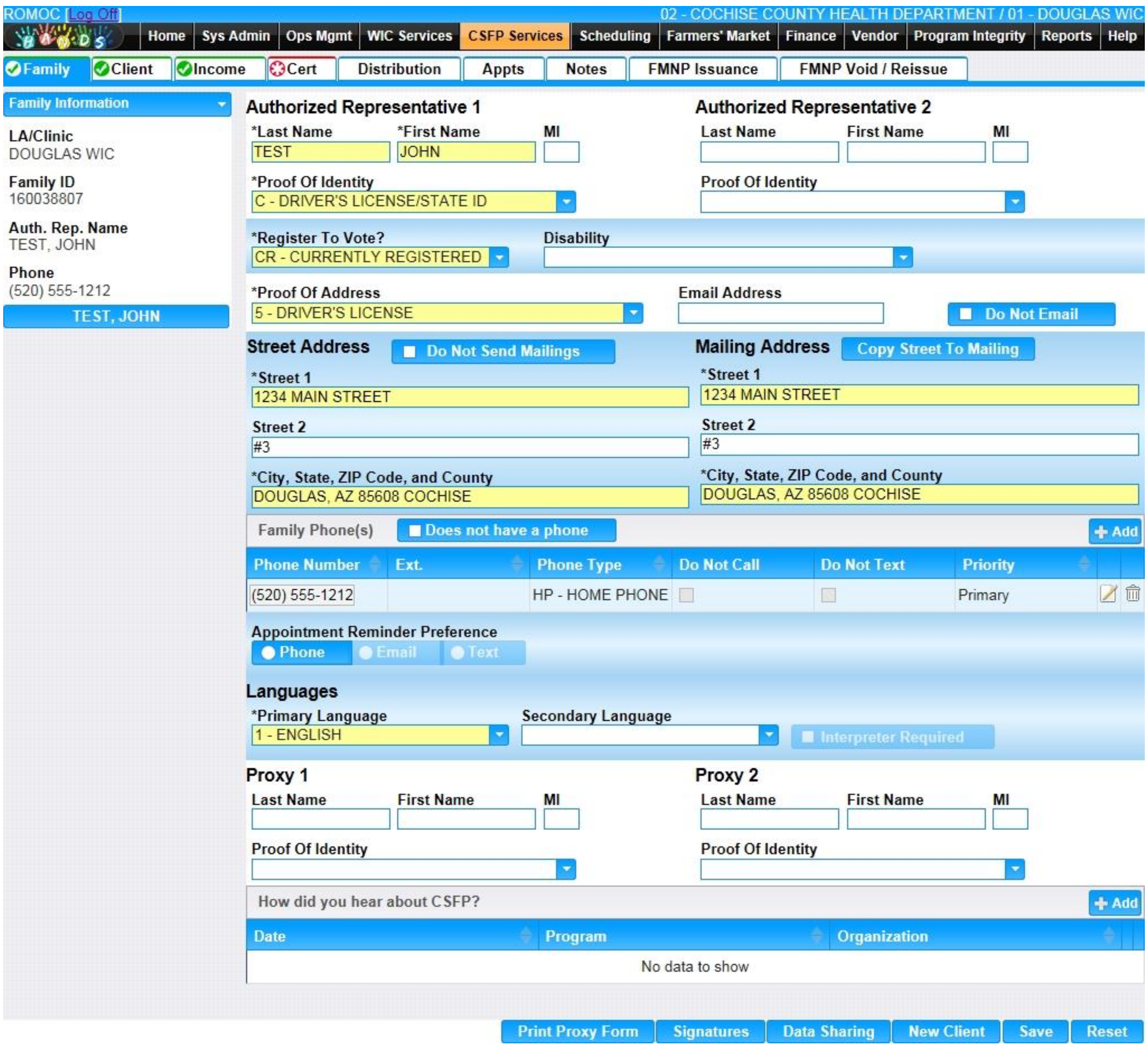


Figure 3: Family Information Page

Fields:

- **Clinic –** Drop down list populated with a list of clinics. This field is mandatory

Authorized Representative 1

- **Last Name –** Free text field for Authorized Rep 1 last name. This field is mandatory.
- **First Name –** Free text field for Authorized Rep 1 first name. This field is mandatory.

- **MI –** Free text field for Authorized Rep 1 middle initial. This field is optional.
- **Proof of Identity –** Drop down list populated with proof of identity values. This field is mandatory.
- **Register to Vote –** Drop down list populated with register to vote values. This field is mandatory.
- **Disability –** Drop down list populated with disability values. This field is optional.
- **Proof of Address –** Drop down list populated with proof of address values. This field is mandatory.
- **Email Address –** Free text field for email address. Must be in proper email format. This field is optional.

Authorized Representative 2

- **Last Name –** Free text field for Authorized Rep 2 last name. This field is optional unless First Name or MI is filled in.
- **First Name –** Free text field for Authorized Rep 2 first name. This field is optional unless Last Name or MI is filled in.
- **MI –** Free text field for Authorized Rep 2 middle initial. This field is optional unless Last Name or First Name is filled in.
- **Proof of Identity –** Drop down list populated with proof of identity values. This field is optional unless Authorized Representative 2 Last Name and First Name is filled in.

Street Address

- **Street 1 –** Free text field for street address. This field is mandatory.
- **Street 2 –** Free text field for line 2 of street address. This field is optional.
- **City, State, Zip Code, and County –** Predictive text field based on city or zip code. This field is mandatory.

Mailing Address

- **Street 1 –** Free text field for street address. This field is mandatory.
- **Street 2 –** Free text field for line 2 of street address. This field is optional.
- **City, State, Zip Code, and County –** Predictive text field based on city or zip code. This field is mandatory.

Family Phones Grid

- **Phone Number –** Phone number entered for the family. This field is display only.
- **Ext. –** Extension for the phone number entered. This field is display only.
- **Phone Type –** Type of phone number entered. This field is display only.
- **Do Not Call –** Checkbox checked/unchecked for family. This field is display only.
- **Do Not Text –** Checkbox checked/unchecked for family. This field is display only.
- **Priority –** Primary/Secondary/Other displayed for family. This field is display only.

Languages

- **Primary Language –** Drop down list populated with language values. This field is mandatory.
- **Secondary Language –** Drop down list populated with language values. This field is optional.

Proxy 1

- **Last Name –** Free text field for proxy 1 last name. This field is optional unless First Name, MI, or Proof of Identity is filled in.

- **First Name** – Free text field for proxy 1 first name. This field is optional unless Last Name, MI, or Proof of Identity is filled in.
- **MI** – Free text field for proxy 1 middle initial. This field is optional.
- **Proof of Identity** – Drop down list populated with proof of identity options for Proxy 1. This field is optional unless Last Name, First Name, or MI is filled in.

Proxy 2

- **Last Name** – Free text field for proxy 2 last name. This field is optional unless First Name, MI, or Proof of Identity is filled in.
- **First Name** – Free text field for proxy 2 first name. This field is optional unless Last Name, MI, or Proof of Identity is filled in.
- **MI** – Free text field for proxy 2 middle initial. This field is optional.
- **Proof of Identity** – Drop down list populated with proof of identity options for Proxy 2. This field is optional unless Last Name, First Name, or MI is filled in.

- **How did you hear about CSFP?(grid)**
  - **Date** – Date question was answered and entered. This field is display only.
  - **Program** – Program name for question answered. This field is display only.
  - **Organization** – Organization name for question answered. This field is display only.

Buttons:

- **Do Not Email** – Indicates whether or not the client wishes to receive email.
- **Do Not Send Mailings** – Indicates whether or not the client wishes to receive mail.
- **Copy Street to Mailing** – Copies the street address to the mailing address.
- **Does Not Have a Phone** – Indicates the client does not have a phone.
- **Add in (phone grid)** – Initiates the process to add a phone number.

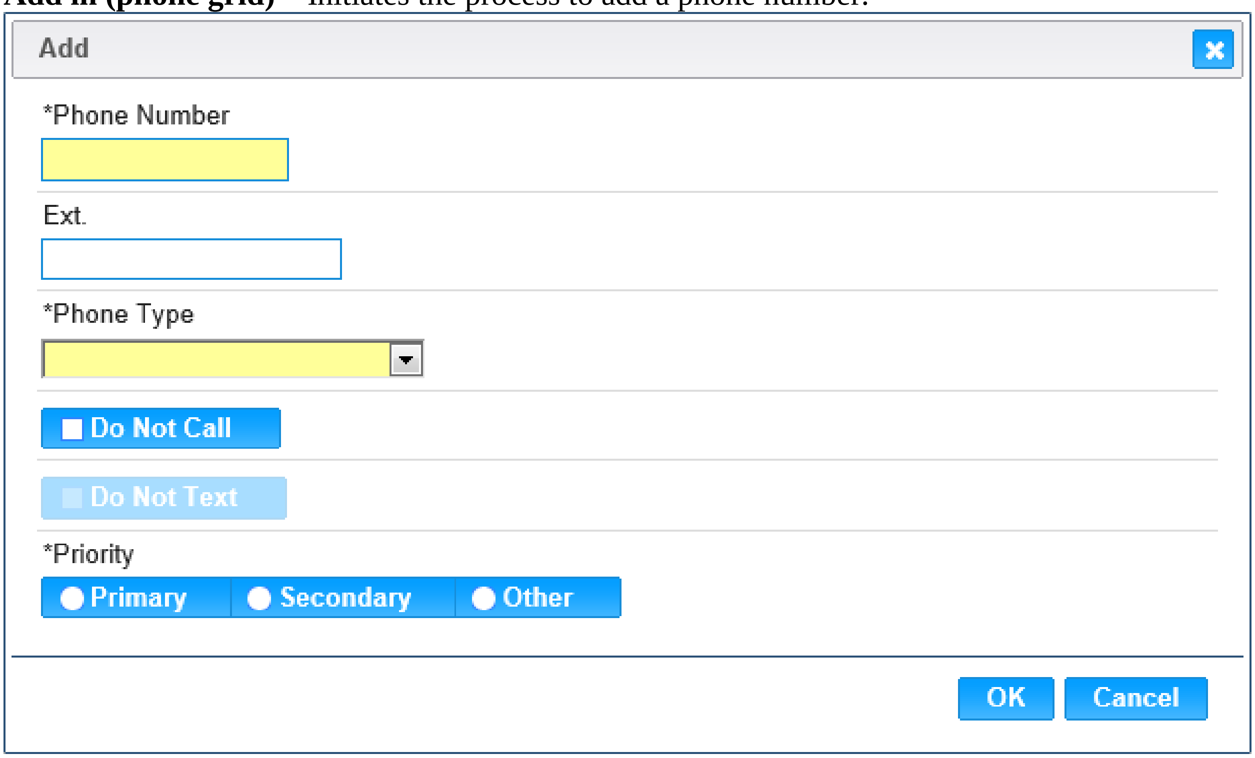


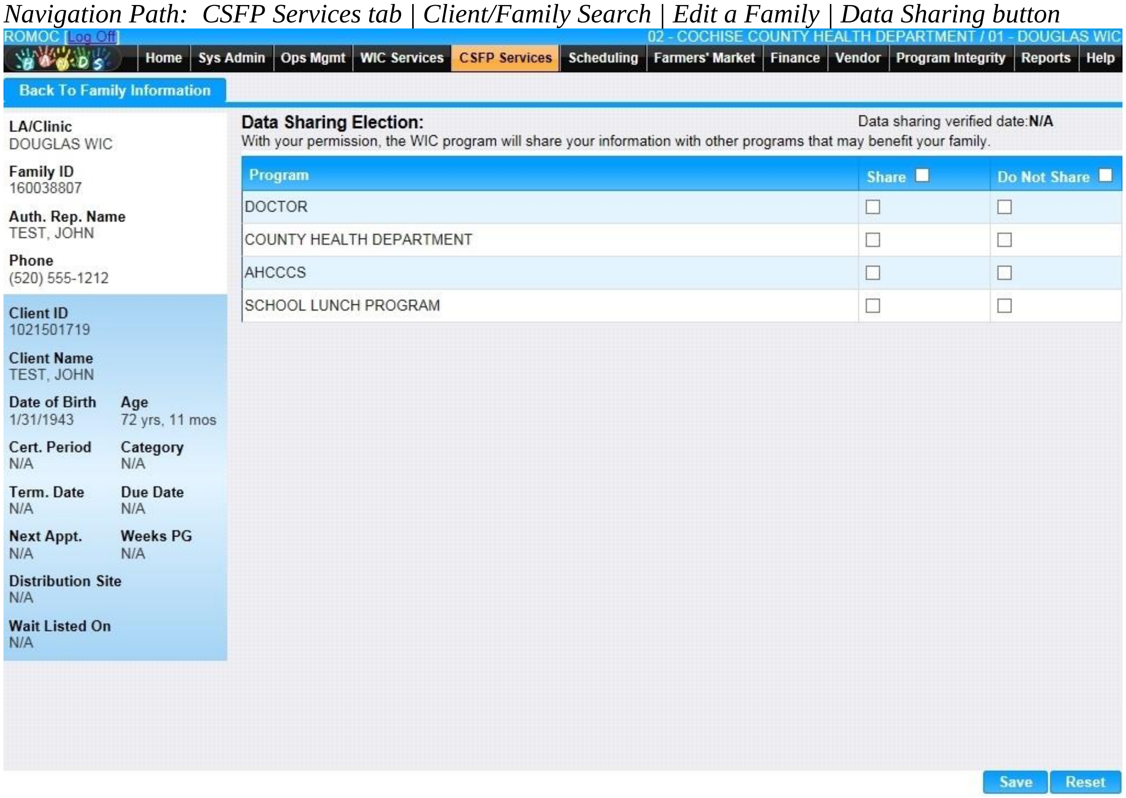
Figure 3.1: Add Phone Number

  - **Phone Number –** Free numerical text field for phone number. This field is mandatory.
  - **Ext. –** Free numerical text field for phone extension. This field cannot be more than 5 digits and is optional.
  - **Phone Type –** Drop down list of phone type values. This field is mandatory.
  - **Do Not Call –** Indicates whether or not the client wants to receive phone calls.
  - **Do Not Text –** Indicates whether or not the client wants to receive text messages.
  - **Priority –** Indicates if the phone number is Primary/Secondary/Other. At least one phone number must be the Primary phone. This field is mandatory.
  - **OK –** Completes the add phone process.
  - **Cancel –** Closes the window without saving phone information.
- **Appointment Reminder Preference –** Indicates appointment reminder preference. Available options are based on phone types entered. This field is optional.
- **Interpreter Required –** Indicates if an interpreter is required.
- **Add –** Initiates the process to add how client heard about CSFP.
- **Print Proxy Form –** Displays blank proxy form that can be printed.
- **Save –** Initiates save on the family page.
- **Reset –** Clears all fields that have not been previously saved.
- **Cancel –** Closes the family page with no action.

Buttons After Save:

- **Signatures –** Initiates the signature pad functionality.
- **Data Sharing –** Initiates the Data Sharing page.

  Navigation Path: CSFP Services tab | Client/Family Search | Edit a Family | Data Sharing button



  - **Data Sharing Election Grid:**

- **Program –** Lists the program data may or may not be shared with.
- **Share –** Checkbox to select to share client information with this program.
- **Do Not Share -** Checkbox to select to not share client information with this program.

Buttons (Data Sharing Election Page)

- **Save –** Saves the information entered on the page.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculation(s): None

Background Processes:

1) A user may enter only one number with the priority of primary and one as secondary. As many numbers as desired may be entered that have a priority of other.
2) The phone appointment reminder preference option will be disabled if no phone number is listed or the do not call checkbox is checked for all numbers listed for the Family. The email option will be disabled if no email address is entered or the do not email checkbox is checked for the Family. The text option will be disabled if no number exists with the phone type of cell phone or the do not text checkbox is checked for the Family.
3) The majority of forms for Arizona will be in both English and Spanish. If populated while in a Client record, forms will populate in the primary language of the Family (Spanish or English only). If the primary language is something other than Spanish or English, the default language will be English. For more information, see the Forms section of this document.
4) The system performs a four step save process when saving a new Family:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Finally, after the other three steps have been completed successfully the system assigns a unique system generated Family ID to the Family and adds the Family data to the database. The Family ID format is FY9999999. The first two digits are dependent on the fiscal year from the Budgeting Factors table. The remaining seven digits are a unique system generated sequence that is incremented by one after each new Family creation. For more information, see the Budgeting Factors section of the FNS-798 DFDD.
    NOTE: If the Budgeting Factor table for the current fiscal year is not configured the creation of the Family ID will fail.

5) Register to vote? Selection will be cleared if there are any edits to Street Address or Mailing Address.
6) If the family's primary language is not '1 – English', the 'Interpreter required' checkbox will be enabled.
7) Auth. Rep proof of Identity will be cleared if there are any changes to Auth. Rep name.

4 CLIENT PAGE

The CSFP Client page is used to enter demographic information for a client, such as name and date of birth. The completion and saving of this page will generate a unique Client ID for that client.

Navigation Path: CSFP Services | Client Page

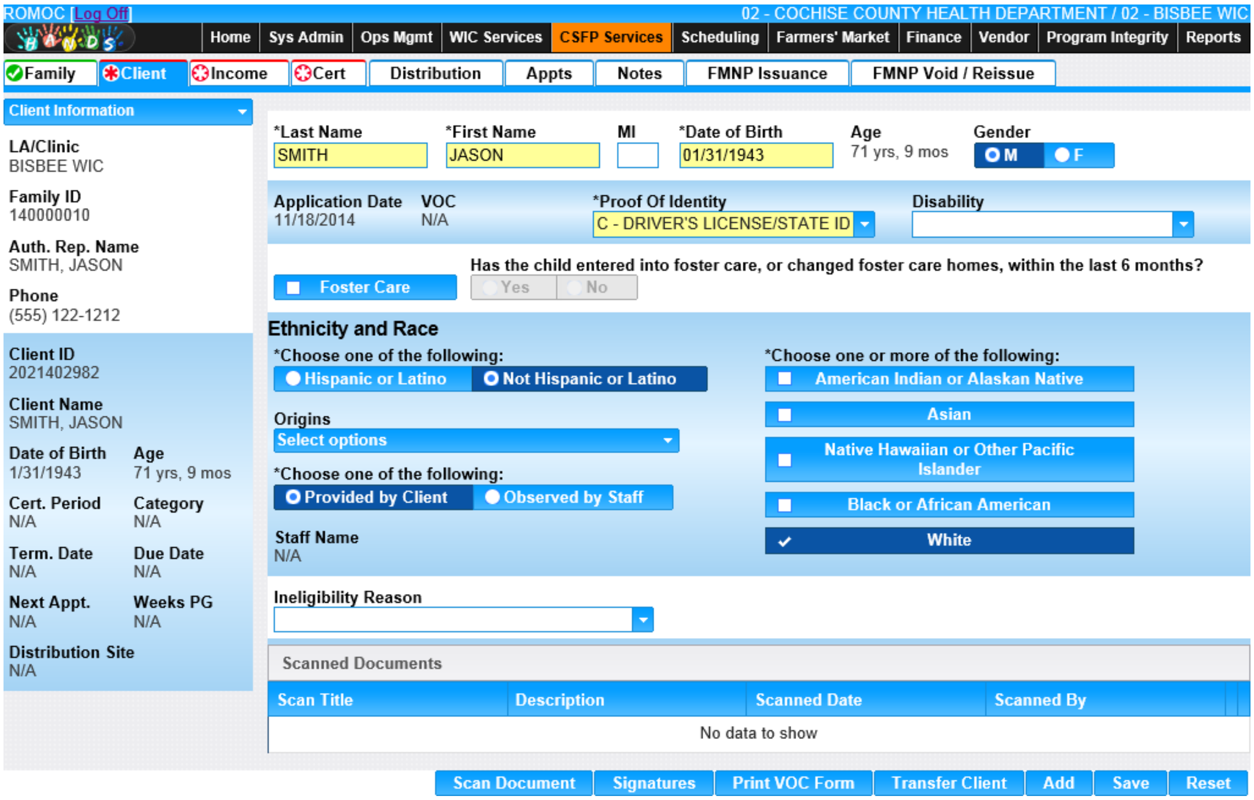


Figure 4: Client page

Fields:

- **Last Name** – Free text field for client last name. This field is mandatory.
- **First Name** – Free text field for client first name. This field is mandatory.
- **MI** – Free text field for client middle initial. This field is optional.
- **Date of Birth** – Date field for client date of birth. This field is mandatory.

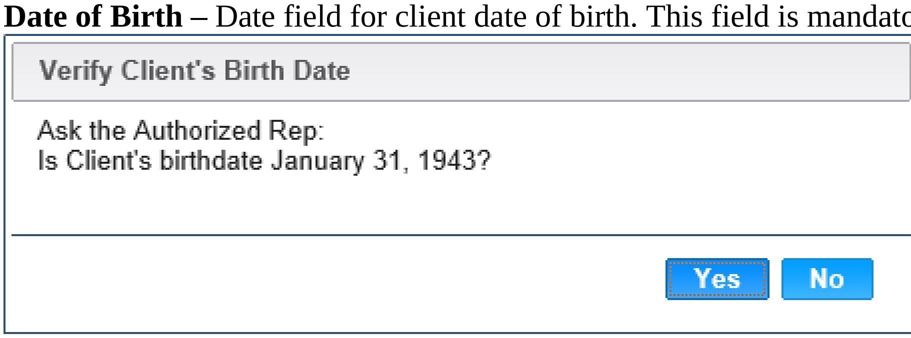


Figure 4.1: Verify Date of Birth Message

- **Yes** – Confirms the birth date

    - **No –** Clears the Date of birth field for user to enter a new date
- **Age –** Age of the client. This field is display only.
- **Gender –** M/F indicator used to indicate gender of the client. This field is mandatory.
- **Application Date –** The date the client applied. Defaults to current date.
- **VOC –** VOC number. This field is display only unless the user is in the Out of State transfer workflow.
- **Proof of Identity –** Drop down list prepopulated with proof of identity values. This field is mandatory.
- **Disability –** Drop down list prepopulated with disability values. This field is optional.
- **Has the child entered into foster care, or changed foster care homes, within the last 6 months?**
    - **Foster Care –** Selection indicates the client is in foster care.
    - **Yes –** Selection indicates the child entered into foster care, or changed foster care homes, within the last 6 months.
    - **No –** Selection indicates the child has not entered into foster care, or changed foster care homes, within the last 6 months.

Ethnicity and Race:

- **Choose one of the following (at least one selection is mandatory):**
    - **Hispanic or Latino –** Selection indicates client is Hispanic or Latino
    - **Not Hispanic or Latino –** Selection indicates client is not Hispanic or Latino
- **Origins –** Multi-select drop down list populated with origin values
- **Choose one of the following (at least one selection is mandatory):**
    - **Provided by Client –** Selection indicates information provided by the client
    - **Observed by Staff –** Selection indicates information is observed by staff member
- **Staff Name –** User name who created the client. This field is display only.
- **Choose one or more of the following (at least one selection is mandatory):**
    - **American Indian or Alaskan Native –** Selection indicates client is American Indian or Alaskan Native
    - **Asian –** Selection indicates client is Asian
    - **Native Hawaiian or Other Pacific Islander –** Selection indicates client is Native Hawaiian or Other Pacific Islander
    - **Black or African American –** Selection indicates client is Black or African American
    - **White –** Selection indicates client is White

- **Ineligibility Reason –** Drop down list populated with ineligibility reason values
- **Scanned Documents (grid – all fields are display only):**
    - **Scan Title –** Displays the title of a scanned document
    - **Description –** Displays the description of a scanned document
    - **Scanned Date –** Displays the scanned date of a scanned document
    - **Scanned by –** Displays the user name of the person that scanned the document

Buttons:

- **Save –** Initiates save of the information entered on the page
- **Reset –** Clears all fields that have not been previously saved

- **Cancel** – Closes the client page with no action

Buttons After Save:

- **Scan Document** – Redirects to the scanning page
- **Signatures** – Redirects to the signature page
- **Print VOC Form –** Initiates the process to print the VOC form

If the client is not certified:

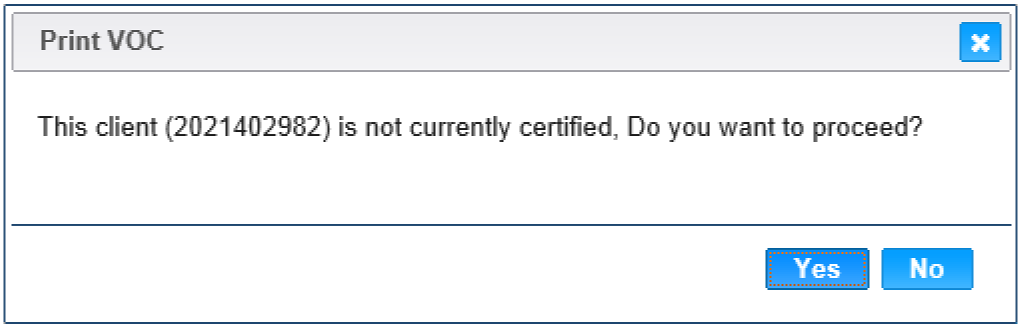


Figure 4.2: Print VOC Message

Yes – Continues the print process

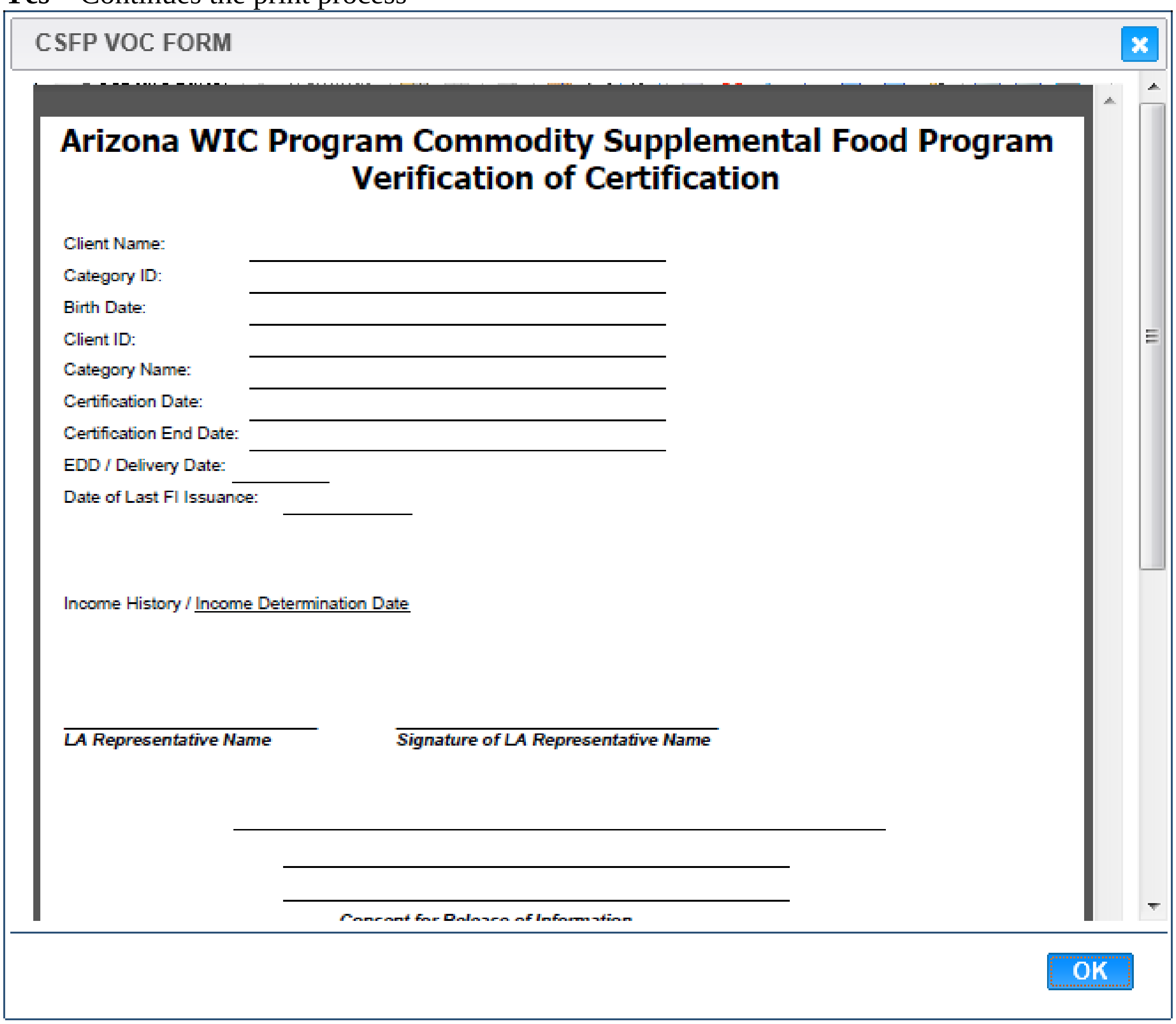


Figure 4.3: VOC Form

OK – Closes the window with no action
If client is certified:

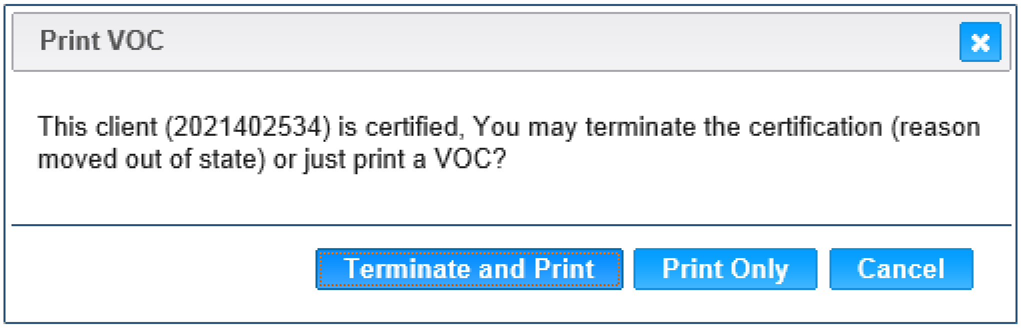


Figure 4.4: Print VOC Message

Terminate and Print – Automatically terminates the client and continues VOC print process
Print Only – Continues VOC print process
Cancel – Closes the window and no action is taken

No – Closes the window with no action

- **Transfer Client –** Initiates the client transfer process *(Refer to Transfer client Section 2..3)*
- **Add –** Initiates the add client process
- **Save –** Saves any information added/changed from the previous save

Calculation(s):

1) The age field will populate with the calculated number of years followed by the number of months based on the number of days between the Client’s date of birth and today. The number of days for the Client’s age will be rounded down to the nearest month (i.e. Client is 2 years, 3 months and 25 days old. The age field will display 2 yrs, 3 mos).

Background Processes:

1) The system performs a six step save process when saving a new Client:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Fourth, it ensures that the Client is eligible to be saved base on the Clients date of birth.
    e. Fifth, it checks to see if the Client is a possible dual enrollment.

   f. Finally, after the other five steps have been completed successfully the system assigns a unique system generated Client ID to the Client and adds the Client data to the database. The Client ID format is CLLA9999999. The first two digits (CL) is the organizational code of the Clinic that the Client is being created in. The second two digits (LA) is the organizational code of the Local Agency that the Client is being created in. For more information on organizational codes, see the Organizational Units section of the Operations Management DFDD. The remaining seven digits are a unique system generated sequence that is incremented by one after each new Client creation. After the save process has been completed and the new Client has been assigned a Client ID, the Client will be within the Family record from which the process of creating a new Client was started. The user will be displayed on the new Clients, Client Information page.

2) For clients with age between 1 and 5 years, category (C1, C2, C3, C4, and C5) will be calculated and saved with the client record.
3) Duplicate client check is performed upon save. The following are the conditions used to check duplicate clients in the system:
   a. Same Last name, matched up to 8 characters.
   b. Same First name, matched up to 6 characters.
   c. Same Middle Initial.
   d. Same Gender.
   e. Same birth year and birth month.

4.1 Scan Document Page

Navigation Path: CSFP Services | Client Page | Scan Document Button

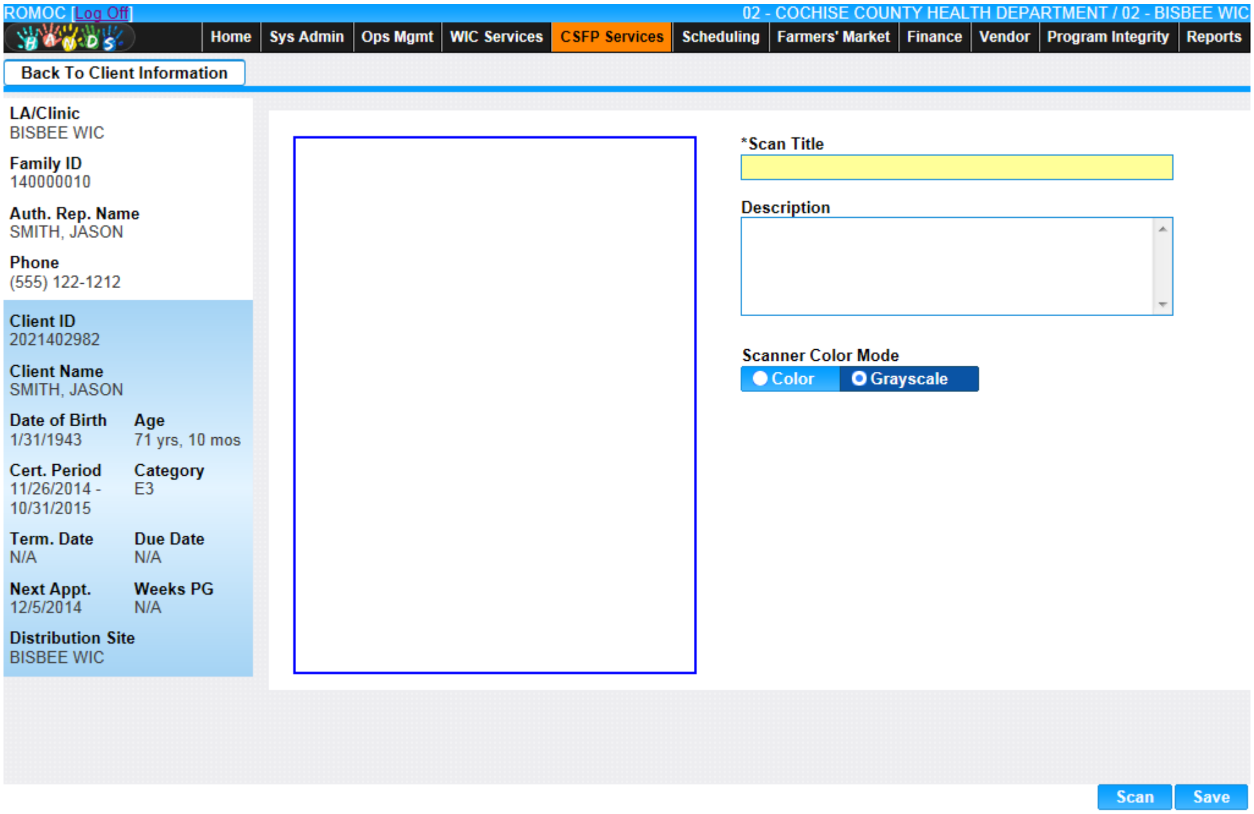


Figure 4.5: Scan Document page

Fields:

- **Scan Title** – Free text field to enter a title of the document being scanned
  This field is mandatory.
- **Description** – Free text field to enter comments.
  This field is optional.
- **Scanner Color Mode** – Selection determines whether to scan in Grayscale or Color
  This field is mandatory.

Buttons:

- **Scan** – Initiates the scan process
- **Save** – Initiates the save of the scanned document
- **Back to Client Information** – Directs user back to the Client page

Calculation(s): None

Background Processes:

1) Prior to saving, the system ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.

4.2 Signatures - Client Page

This page is used to collect client signatures.

Navigation Path: CSFP Services | Client Page | Signatures Button

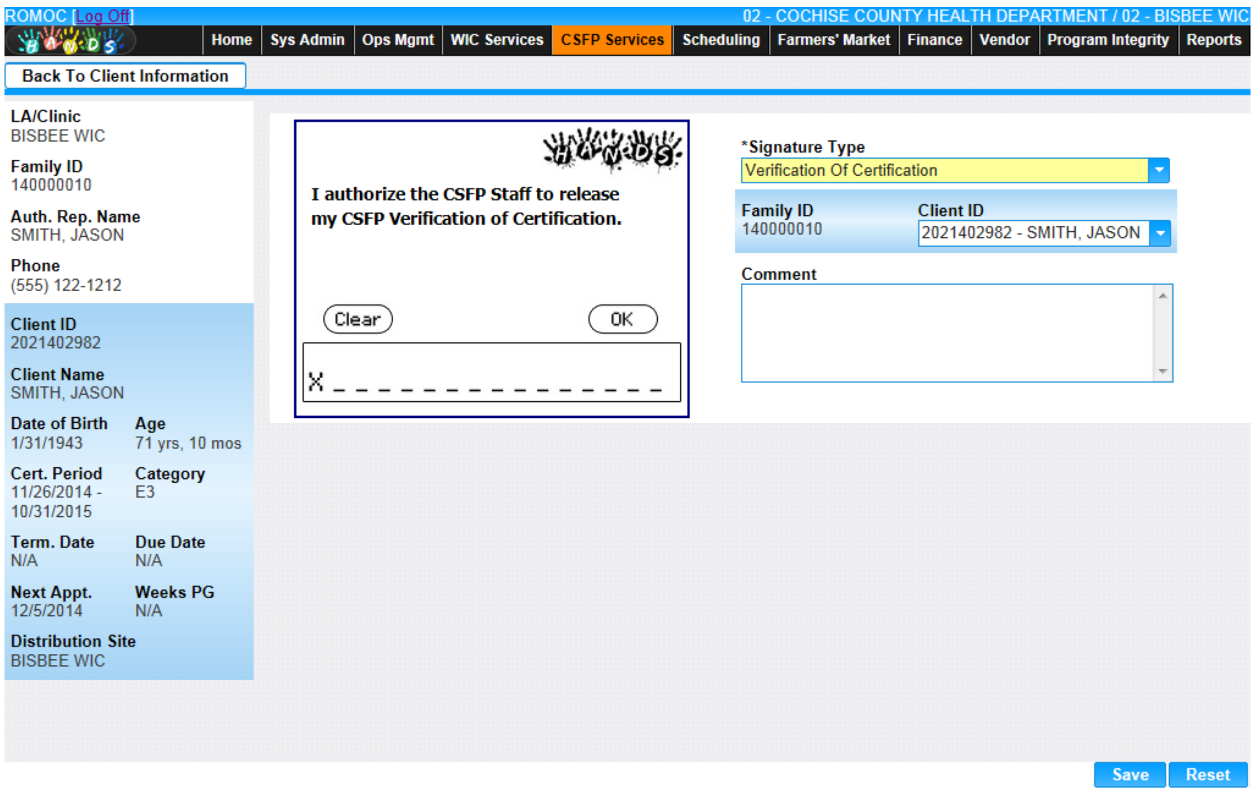


Figure 4.6: Signatures page

Fields:

- **Signature Type –** Drop down selection of type of signature to capture
- **Family ID –** A unique, system generated identification number for the family. This field is display only.
- **Client ID –** Drop down selection of a unique, system generated identification number for the client.
- **Comment –** Free text field for comments regarding the signature being captured.

Buttons:

- **Save –** Initiates the save process.
- **Reset –** Unsaved edits are cleared restoring the form to its previously unedited state.
- **Back to Client Information –** Redirects user to the Client page.

Calculation(s): None

Background Processes:

1) Prior to saving, the system ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown

5 INCOME PAGE

This page is used to document income for CSFP Clients.

Navigation Path: CSFP Services | Income Page

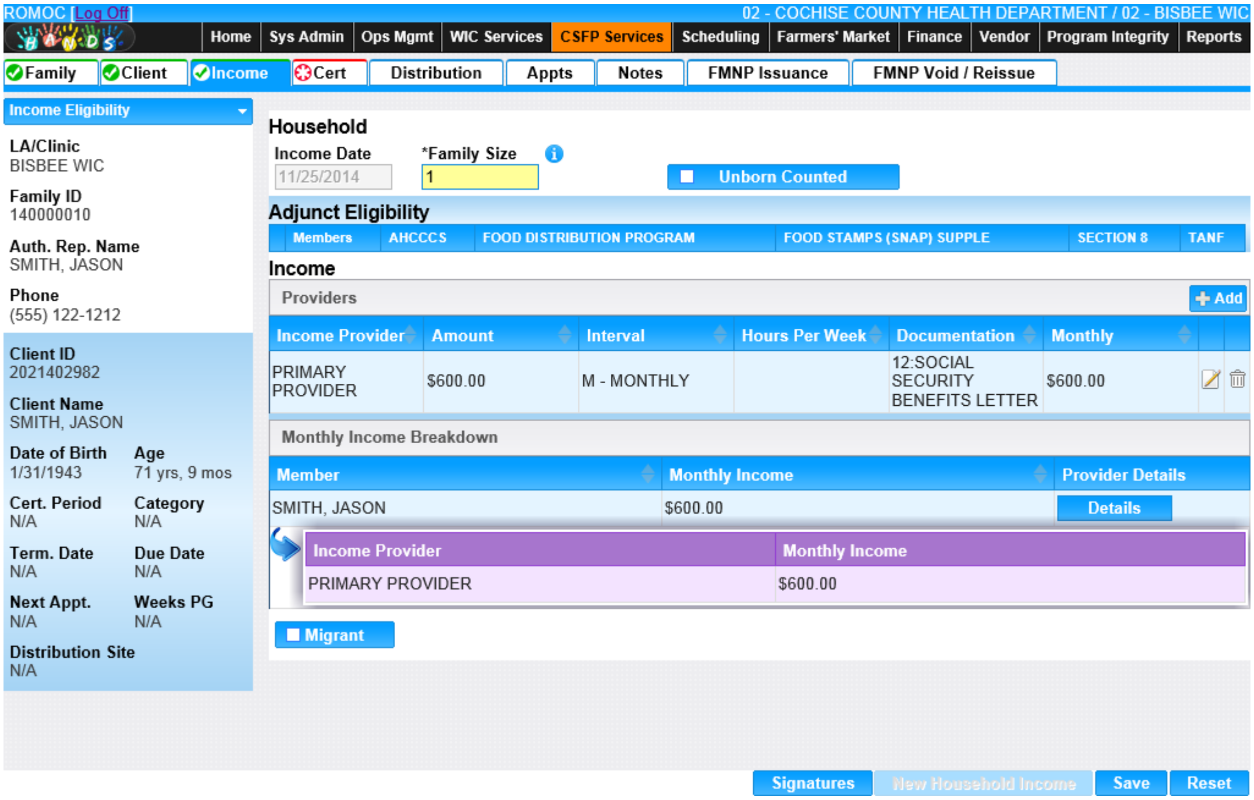


Figure 5: Income page

Fields:

- **Income Date –** Date the income is recorded. This field defaults to the current date and is display only.
- **Family Size –** Numerical field for family size. This field is mandatory.
  (Information Icon) with the mouse additional information will be displayed about what to enter as Family size. The Family size is used in the calucaltion to determine if the Client and or Family meet the requirments to be on the CSFP program.

Adjunct Eligibility Grid:

- **Adjunct eligibility is not used for CSFP clients.**

Income:

Providers Grid (fields are display only):

- **Income Provider –** Displays the name of the income provider.
- **Amount –** Displays the dollar amount of the income entered.
- **Interval –** Displays the interval of the income.
- **Hours Per Week –** Displays the hours per week of the income.
- **Documentation –** Displays the documentation provided for the income.
- **Monthly –** Displays the monthly amount for the entered income.
- **Edit Icon –** Select to edit the income provider entry.

- **Delete Icon** – Select to delete the income provider entry.

Monthly Income Breakdown Grid (fields are display only):

- **Member** – Displays the client name to which income is applied.
- **Monthly Income** – Displays the monthly amount to the client for the entered income.
- **Provider Details** – Select button to see provider and income details for the client.

Buttons:

- **Add (Provider Grid)** – Select to add a new income provider entry.

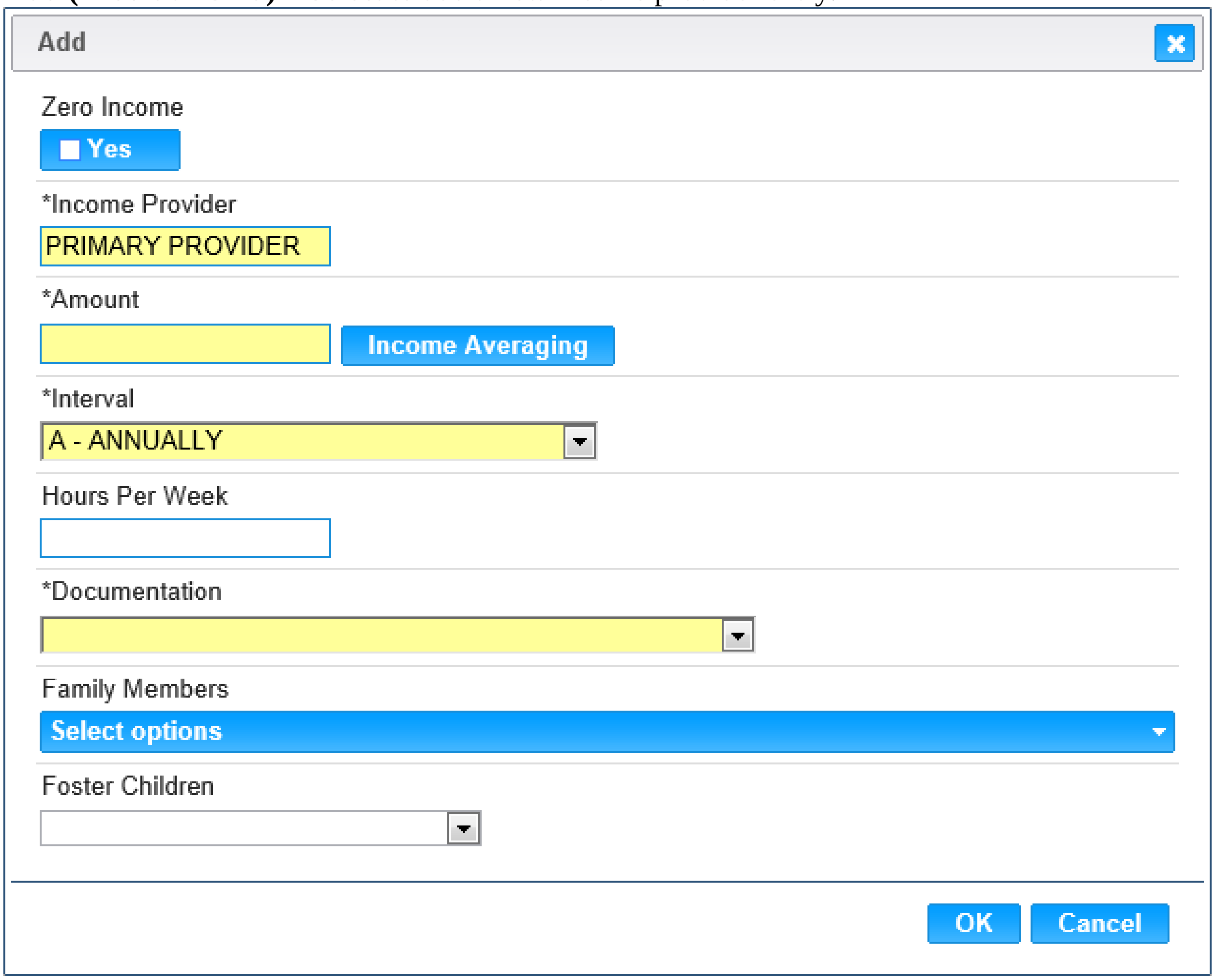


Figure 5.1: Add Income Provider

- **Zero Income** – Selection to identify zero income for the client.
- **Income Provider** – Free text field for the name of the income provider, defaults to Primary Provider. This field is mandatory.
- **Amount** – Numerical field entry of the amount of income for the client. This field is mandatory.
- **Income Averaging** – Select to initiate the income averaging tool

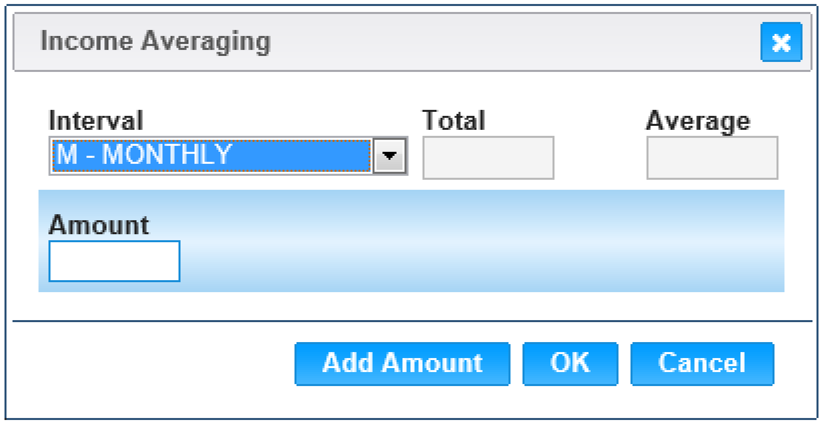


Figure 5.2: Income Averaging

        - **Interval** – Drop down selection of the payment interval.
        - **Total** – The sum of the Amount fields. This field is display only.
        - **Average** – The average of the Amount fields. This field is display only.
        - **Amount** – Numerical field for the income amount.
        - **Add Amount** – Select to add another amount field for averaging.
        - **OK** – Select to close the window. The number displayed in the average field will be displayed in the amount field on the Add an Income page along with the interval entered.
        - **Cancel** – Closes the window and no action is taken.
    - **Interval** – Drop down selection of the payment interval. This field is mandatory.
    - **Hours Per Week** – Numerical field for the hours per week the client works.
    - **Documentation** – Drop down selection for the documentation used as proof of income. This field is mandatory.
    - **Family Members** – Drop down multi-select of family members to apply income to.
    - **Foster Children** – Drop down selection of what foster child to apply income to.
- **Signatures** – Redirects user to signature page to collect income related client signatures.
- **New Household Income** – Initiates process to add a new household income.
- **Save** – Initiates save of the income record.
- **Reset -** Unsaved edits are cleared restoring the form to its previously unedited state.

Checkboxes:

- **Unborn Counted** – Selection to indicate unborn child is counted in the family size.
- **Migrant** – Selection to indicate a migrant status of the family.

Calculation(s):

1) As the amount and interval for the income record are selected the system performs the following calculations to calculate the monthly amount for each income provider's record.

    a. If the interval selected is annually then the system rounds the result received by dividing the number entered in the amount field by twelve.

b. If the interval selected is weekly then the system rounds the result received by multiplying the number entered in the amount field by fifty-two and then dividing the result by twelve.

c. If the interval selected is monthly then the system displays the number entered in the amount field.

d. If the interval selected is bi-weekly then the system rounds the result received by multiplying the number entered in the amount field by twenty-six and dividing by twelve.

e. If the interval selected is semi-monthly then the system rounds the result received by multiplying the number entered in the amount field by two.

f. If the interval selected is hourly then the system rounds the result received by multiplying the number entered in the amount field by the number entered in the hourly field, then multiplying that result by fifty-two and then dividing the result by twelve.

g. If the interval selected is quarterly then the system rounds the result received by dividing the number entered in the amount field by three.

h. If the interval selected is semi-annually then the system rounds the result received by dividing the number entered in the amount field by six.

Background Processes:

1) The system performs a six step save process when saving a new income:

   a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.

   b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.

   c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.

   d. Fourth, it checks to see what statuses have been entered for the adjunct eligible programs if applicable.

   e. Fifth, it ensures that the calculated monthly income amount is within an acceptable range for the CSFP program in regards to the Family's size.

   f. Finally, after the other five steps have been completed without issue, the system will successfully save the page and add the data to the database. The user will only be able to edit the income record that day. It will become completely disabled after the End of Day process (For more information, see the EOD DFDD).

2) If the Client has forgotten proof of their income then the user will select the "10-Forgot Documentation" option from the documentation drop down list. A Client that does not have proof of income will have the forgot documentation icon displayed on their active record and will only be allowed a single month of issuance. The income record will not be locked until thirty days has past, after the thirty days the income record will become completely disabled. Additionally, the Things to Bring portion of the Appointments tab

for the Client will be populated with forgot documentation wording that is setup by the State Agency. For more information, see both the Appointment Scheduler and System Administration DFDDs.

3) If client(s) is over income then client's valid certification will be terminated with the reason 'B - NOT INCOME ELIGIBLE' upon income record save.

4) System prevents user from selecting Zero Income when one or more clients are participating in an adjunct program with or without proof.

6 CERTIFICATION PAGE

This page is used to certify a CSFP client for a period and category of eligibility. Besides assigning new certifications to a Client, this page is used for maintaining a Client's certification along with performing re-certifications. The user will also be able to extend and terminate a certification on this page.

Navigation Path: CSFP Services | Certification Pages

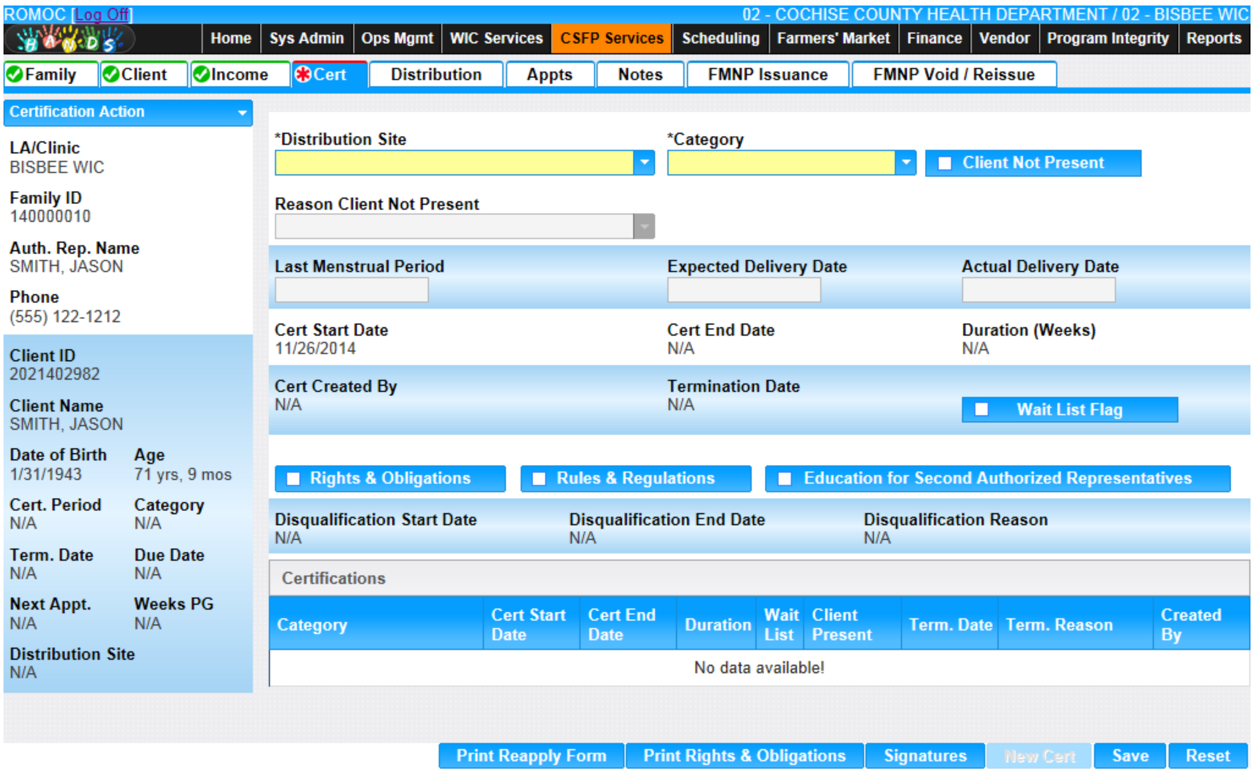


Figure 6: Certification page

NOTE: The entire certification action page will be disabled if the register to vote? (Family information page), proof of identity (Client information page), Data Sharing, and income collection date (Income page) have all not been saved today. Error messages (Figures 5.1, 5.2, 5.3 below) will be displayed at the top of the certification action page indicating what fields needs to be updated before the page can be used.

Insert/Update of Certification Records not allowed until Voter Registration information is updated on the Family Info screen.

Figure 6.1: Must update Voter Registration error message

Insert/Update of Certification Records not allowed until Proof of Identity information is updated on the Client Info screen.

Figure 6.2: Must update Client Proof of Identity error message

Income collection date must be today's date. Insert/update of certification records not allowed.

Figure 6.3: Must update Client Proof of Income error message

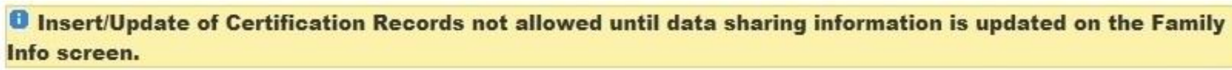


Figure 6.4: Must update Data Sharing error message

Fields:

- **Distribution Site –** Drop down list populated with distribution site values. This field is mandatory.
- **Category –** Drop down list populated with CSFP category values. This field is mandatory.
- **Reason Client Not Present –** Drop down list populated with reasons. This field is mandatory if Client Not Present checkbox is selected.
- **Last Menstrual Period –** Not used for CSFP and is disabled.
- **Expected Delivery Date –** Not used for CSFP and is disabled.
- **Actual Delivery Date –** Not used for CSFP and is disabled.
- **Cert Start Date –** Begin date of certification. This field defaults to the current date and is display only.
- **Cert End Date –** End date of certification. This field is calculated and is display only.
- **Duration (Weeks) –** Length of certification in weeks. This field is calculated and is display only.
- **Disqualification Start Date –** Begin date of disqualification. This field has data only if the client is disqualified and is display only.
- **Disqualification End Date –** End date of disqualification. This field has data only if the client is disqualified and is display only.
- **Disqualification Reason –** Reason client is disqualified. This field has data only if the client is disqualified and is display only.

Certifications Grid (Fields are display only):

- **Category –** Category of the certified client.
- **Cert Start Date –** Begin date of certification for client.
- **Cert End Date –** End date of certification for client.
- **Duration –** Length of certification in weeks.
- **Wait List –** Y/N indicator for client on wait list
- **Client Present –** Y/N indicator if client was present at certification
- **Term. Date –** Date certification was terminated. This field has data only if the client is terminated.
- **Term. Reason –** Reason client was terminated. This field has data only if the client is terminated.
- **Created By –** User name of who certified the client.

Checkboxes:

- **Client Not Present –** Selection indicating the client is not present. This enables the Reason Client Not Present drop down list.
- **Wait List Flag –** Selection indicating client is placed on the wait list.
- **Rights & Obligations –** Selection indicating Rights & Obligations were reviewed with the client.

- **Rules & Regulations –** Selection indicating Rules & Regulations were reviewed with the client.
- **Education for Second Authorized Representatives –** Selection indicating education given to Second Authorized Representative.

Buttons:

- **Print Reapply Form –** Initiates the form display for printing.

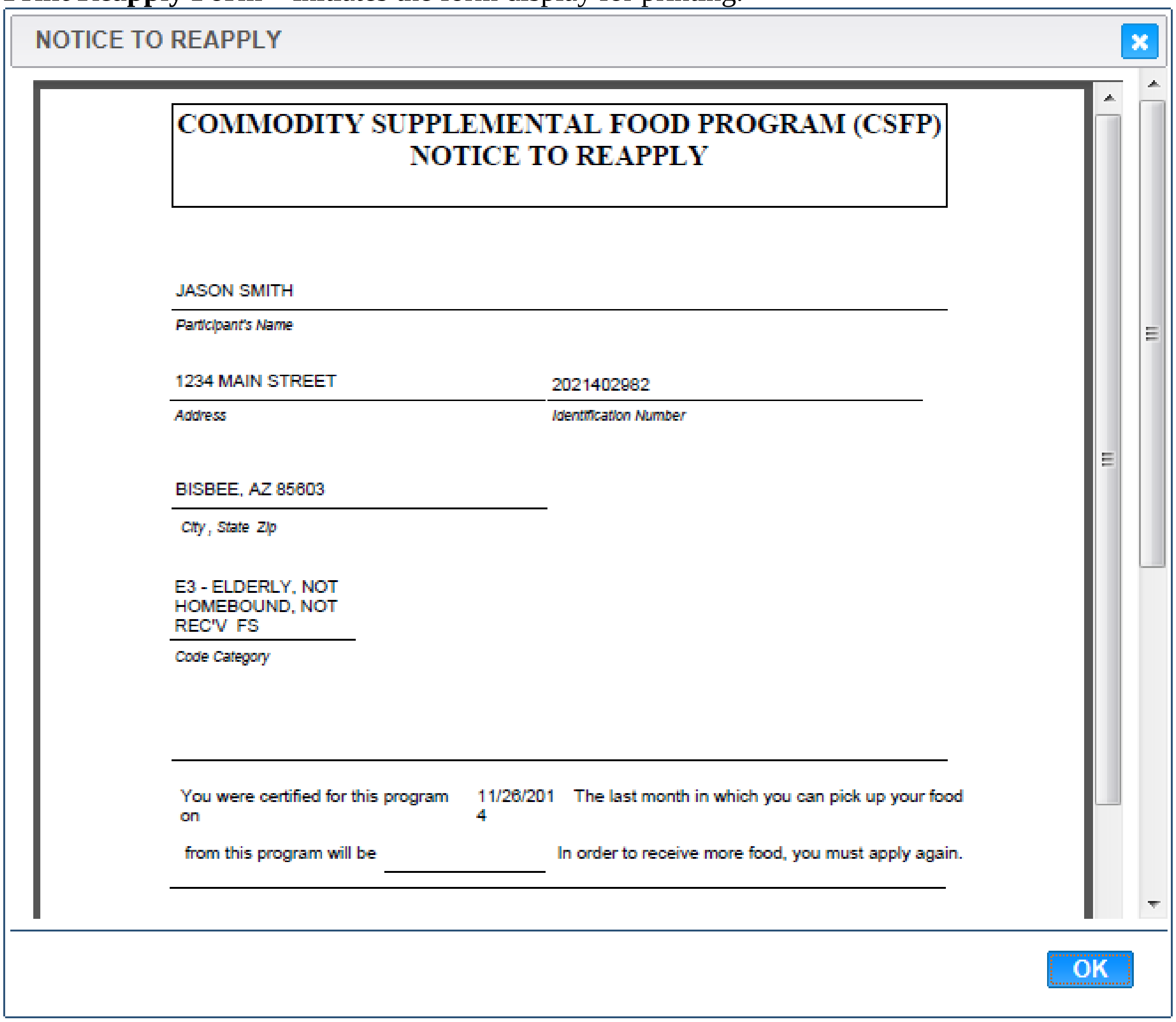
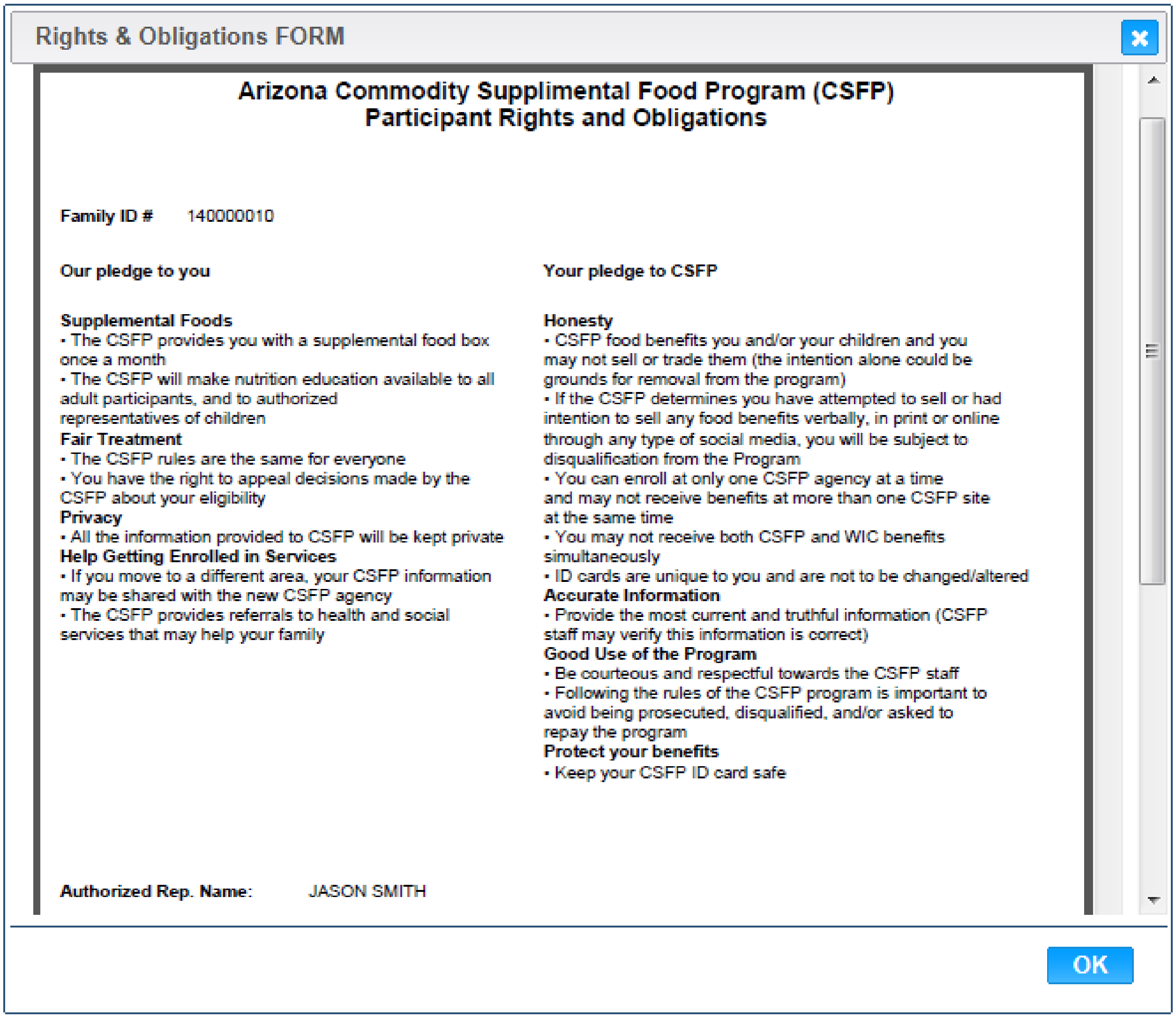


Figure 6.4: Notice to Reapply Form

  - **OK –** Closes the form
- **Print Rights & Obligations –** Initiates the form display for printing.



Rights & Obligations FORM

Arizona Commodity Supplimental Food Program (CSFP)
Participant Rights and Obligations

Family ID # 140000010

Our pledge to you

Supplemental Foods
• The CSFP provides you with a supplemental food box once a month
• The CSFP will make nutrition education available to all adult participants, and to authorized representatives of children
Fair Treatment
• The CSFP rules are the same for everyone
• You have the right to appeal decisions made by the CSFP about your eligibility
Privacy
• All the information provided to CSFP will be kept private
Help Getting Enrolled in Services
• If you move to a different area, your CSFP information may be shared with the new CSFP agency
• The CSFP provides referrals to health and social services that may help your family

Your pledge to CSFP

Honesty
• CSFP food benefits you and/or your children and you may not sell or trade them (the intention alone could be grounds for removal from the program)
• If the CSFP determines you have attempted to sell or had intention to sell any food benefits verbally, in print or online through any type of social media, you will be subject to disqualification from the Program
• You can enroll at only one CSFP agency at a time and may not receive benefits at more than one CSFP site at the same time
• You may not receive both CSFP and WIC benefits simultaneously
• ID cards are unique to you and are not to be changed/altered
Accurate Information
• Provide the most current and truthful information (CSFP staff may verify this information is correct)
Good Use of the Program
• Be courteous and respectful towards the CSFP staff
• Following the rules of the CSFP program is important to avoid being prosecuted, disqualified, and/or asked to repay the program
Protect your benefits
• Keep your CSFP ID card safe

Authorized Rep. Name: JASON SMITH

OK

Figure 6.5: Rights & Obligations Form

- **OK** – Closes the form

- **Signatures** – Redirects user to signature page to collect signatures
- **New Cert** – Initiates a new certification for a terminated client
- **Save** – Initiates save of the certification record
- **Reset -** Unsaved edits are cleared restoring the form to its previously unedited state.

Buttons After Save:

Figure 6.6: Buttons After Save

- **Category Change** – Selection initiates category change for certified client.

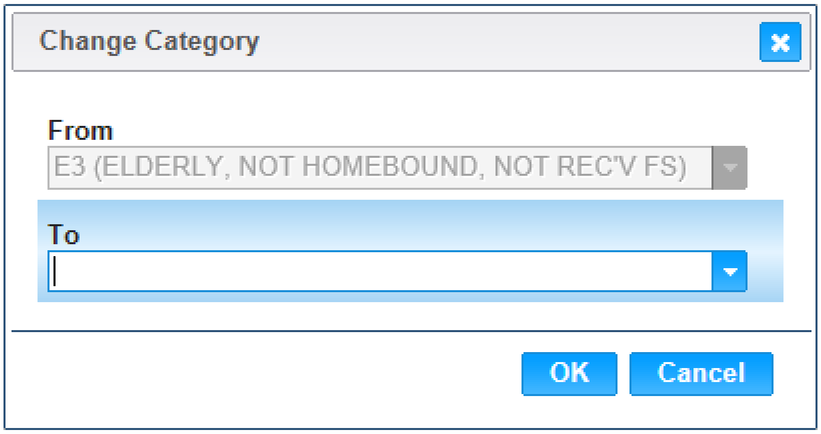


Figure 6.7: Category Change

- **From** – Displays clients current category.
- **To** – Drop down list populated with categories.
- **OK** – Completes the category changes.
- **Cancel** – Closes the window with no action taken.

- **Extend Cert** – Initiates the process to extend the certification.

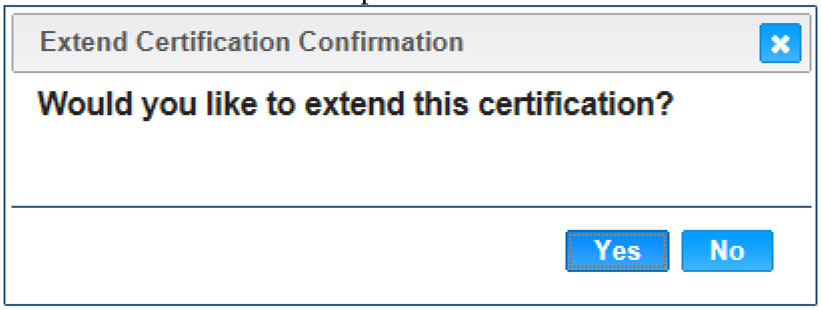


Figure 6.8: Extend Certification Confirmation

- **Yes** – Completes the certification extension.
- **No** – Closes the window with no action taken.

- **Terminate Cert** – Initiates the process to terminate the certification.

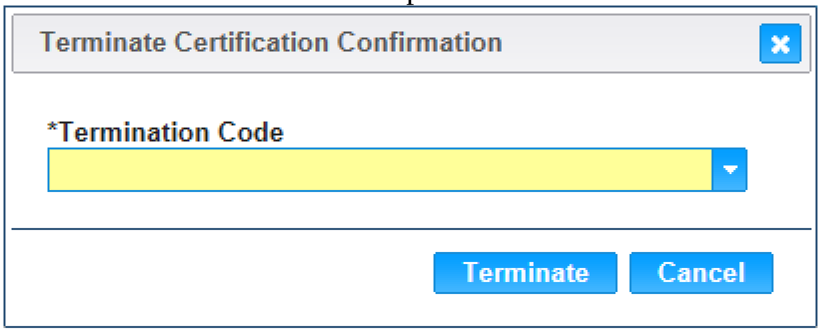


Figure 6.9: Terminate Certification Confirmation

- **Termination Code** – Drop down list populated with termination values.
- **Terminate** – Completes the termination process
- **Cancel** – Closes the window with no action taken.

- **Disqualify** – Initiates the disqualification process.

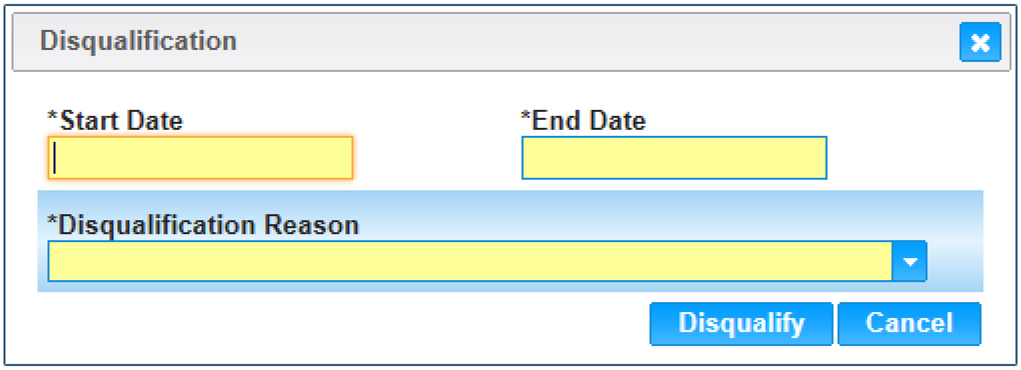


Figure 6.10: Disqualification

- **Start Date** – Calendar field to enter disqualification start date. This field is mandatory.
- **End Date** – Calendar field to enter disqualification end date. This field is mandatory.
- **Disqualification Reason** – Drop down list populated with disqualification values. This field is mandatory.
- **Disqualify** – Initiates the disqualification process.
- **Cancel** – Closes the window and no action is taken.

- **Reinstate Cert** – Initiates the reinstate process for the certification.

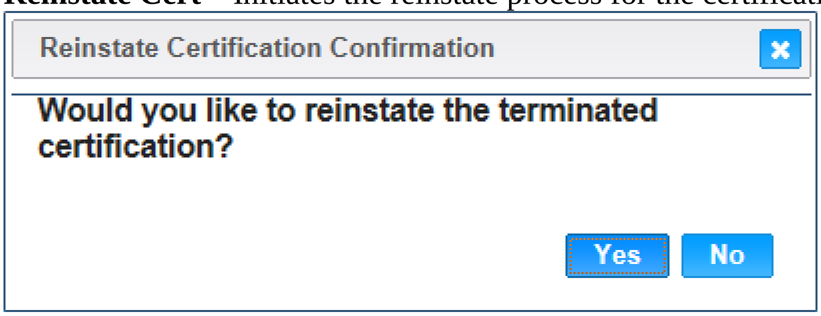


Figure 6.11: Reinstate Certification Confirmation

- **Yes** – Completes the reinstatement of the certification.
- **No** – Closes the window and no action is taken.

Calculation(s):

1) The certification end date field is populated with a date six months from the current date.

Elderly	- LAST_DAY of ADD_MONTHS (SYSDATE, 5)
Migrant	- LAST_DAY of ADD_MONTHS (SYSDATE, 11)

Background Processes:

1) The system performs a three step save process when saving a new certification record:

   a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.

b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.

c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.

d. Fourth, after the other steps have been completed without issue, it successfully saves the page and adds the data to the database. The Client's certification record will be displayed in the certifications grid. The user will be able to edit the current certification record that day only.

2) Family's VoterRegDate will be cleared if is less than 120 days from sysdate.

3) Client record will be updated to have recstatus = Active (A), Category set to current certification category.

7 DISTRIBUTION PAGE

This page is used to record the distribution of food boxes for a distribution site.

Navigation Path: CSFP Services | Distribution Page

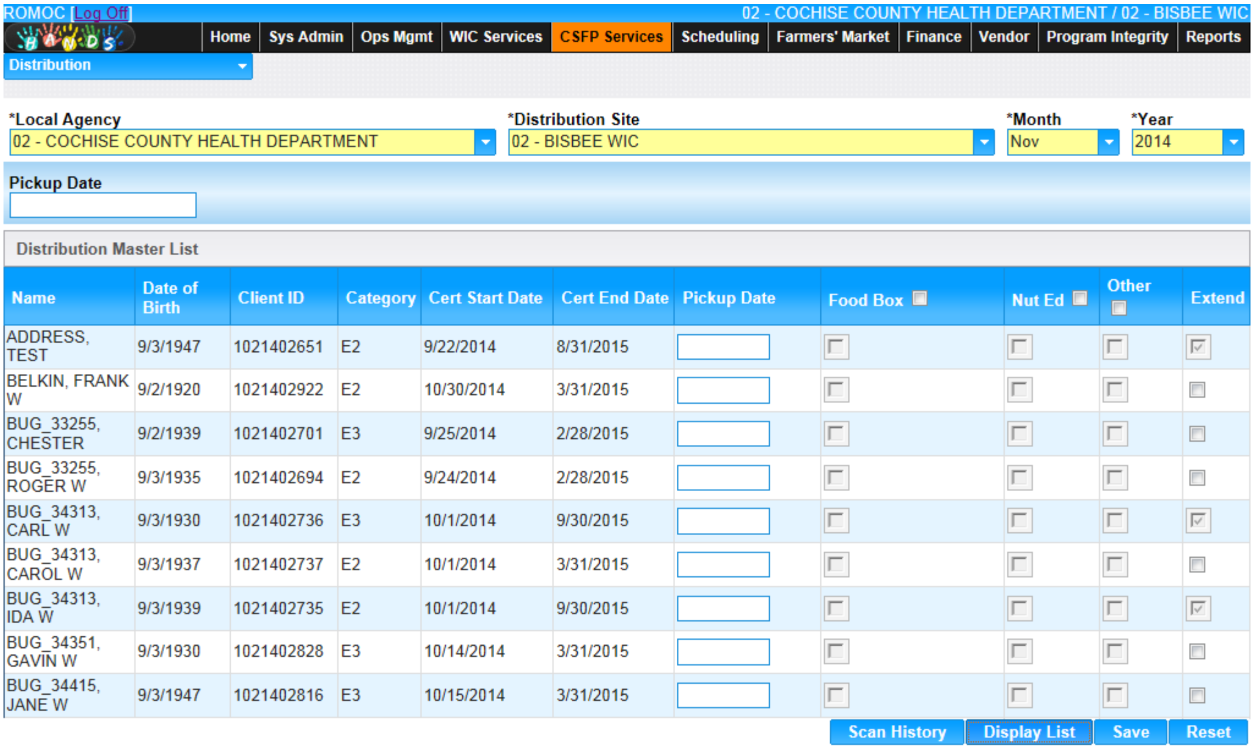


Figure 7: CSFP Distribution Page

Fields:

- **Local Agency** – Drop down list populated with local agency values. This field is mandatory.
- **Distribution Site** – Drop down list populated with distribution site values. This field is mandatory.
- **Month** – Drop down list populated with the months of the year. This field is mandatory.
- **Year** – Drop down list populated with the current and previous year. This field is mandatory.
- **Pickup Date** – Date entry field.

Distribution Master List Grid:

- **Name** – Client name Last name, First name. This field is display only.
- **Date of Birth** – Client date of birth. This field is display only.
- **Client ID** – Client ID for the client listed on that line. This field is display only.
- **Cert Period** – Cert start and end date. This field is display only.
- **Pickup Date** – Date field entered by the user when clients picked up a food box.
- **Food Box** – Selection indicates a food box was distributed to that client. Selection will populate the Pickup Date in the grid. Selection of the checkbox will enable the Nut Ed and Extend checkboxes. Selection of the checkbox next to the label will select all checkboxes on the page.

- **Nut Ed –** Selection indicated nutrition education was given to that client. Selection of the checkbox next to the label will select all checkboxes on the page.
- **Extend –** Selection initiates the certification extension for that client for 6 months.

Buttons:

- **Scan History –** Selection redirects user to Scanned Documents page

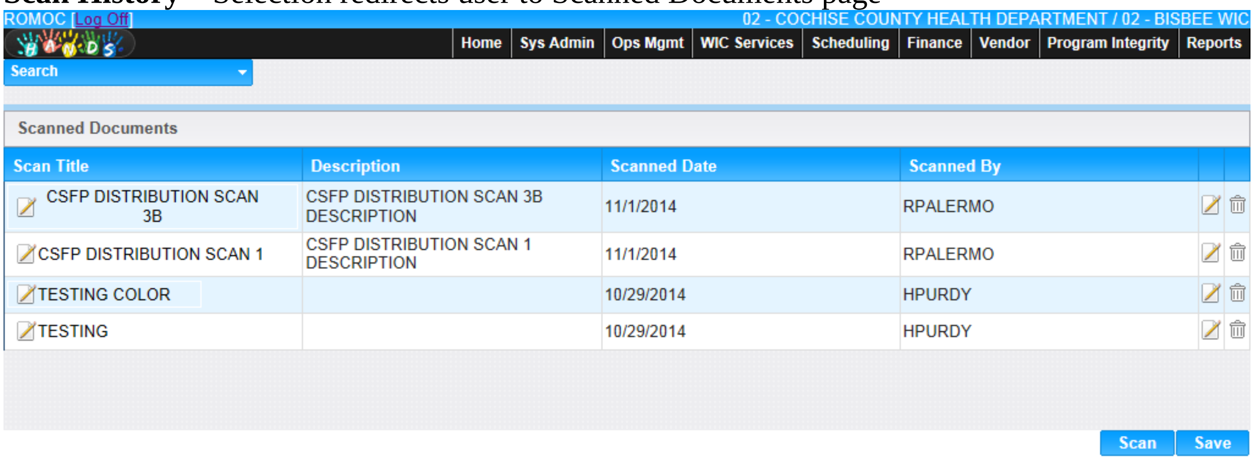


Figure 7.1: Scan History Page

  - **Scan –** Redirects user to the scan page.
  - **Save –** Initiates the save of scanned documents in the list.
- **Display List –** Selection initiates the search for eligible client based on the search criteria.
- **Save –** Selection initiates save of data entered in the grid.
- **Reset -** Unsaved edits are cleared restoring the form to its previously unedited state.

Calculation(s):

Month close out date is calculated by adding Close_Out_Days from f_controls table to the first day of the current month. If closeout date is not passed or user has a CSFP super user role, user can also edit previous month along with the current month data.

Background Processes:

1) If the extend button is checked (enabled for elderly clients), the system will extend client's certification six more months (one time only).

8 APPOINTMENTS PAGE

The Appointments page is used to view scheduled appointments, view scheduled group nutrition discussion appointments, view or add pending services, view appointment history, schedule an appointment, and schedule a group appointment for the client displayed in the active record.

Navigation Path: CSFP Services | Appointments page

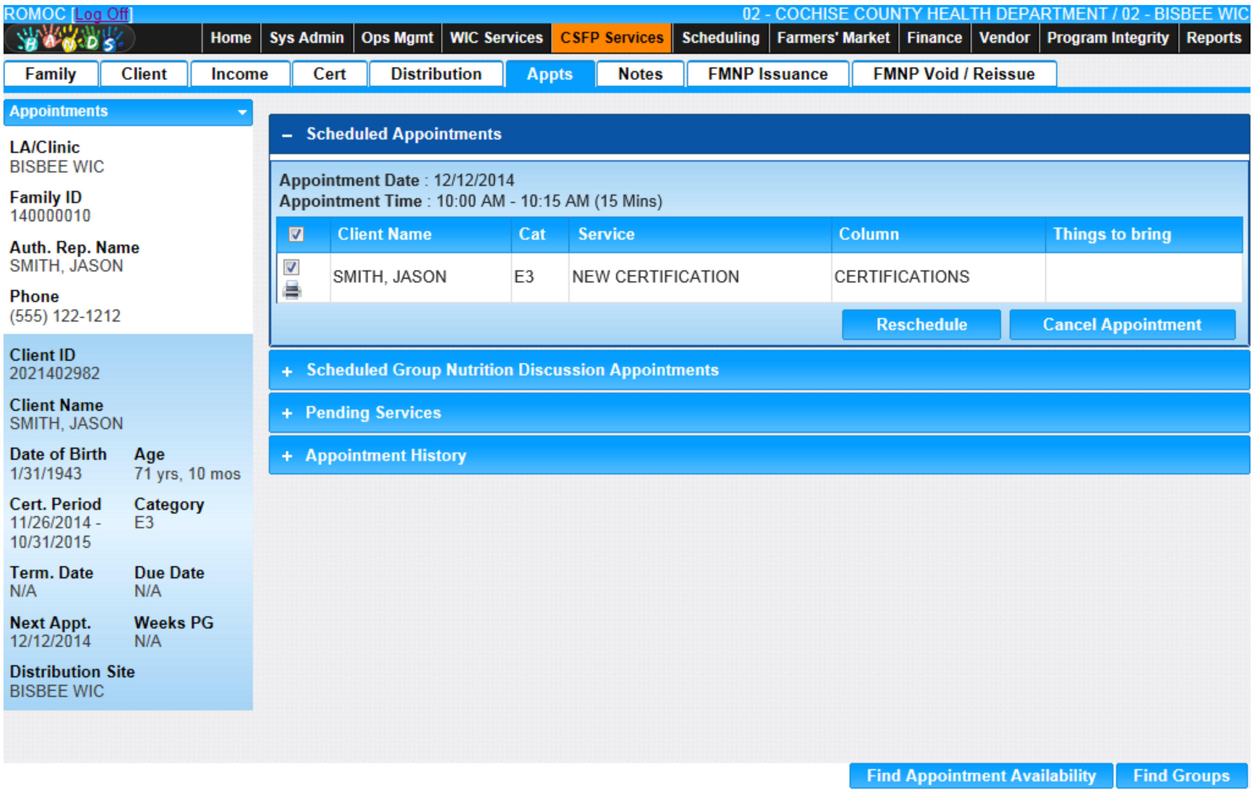


Figure 8: Appointments Page

Fields:

Scheduled Appointments:

- **Appointment Date** – Date of next appointment. This field is display only.
- **Appointment Time** – Time and duration of next appointment. This field is display only.
- **Client Name** – Name of client. This field is display only.
- **Cat** – Category of client. This field is display only.
- **Service** – Service type of the scheduled appointment. This field is display only.
- **Column** – Column name for the scheduled appointment. This field is display only.
- **Things to bring** – Items for the client to bring to the appointment. This field is display only.
- **Reschedule** – Redirects user to appointment scheduler
- **Cancel Appointment** – When selected will cancel the appointment.

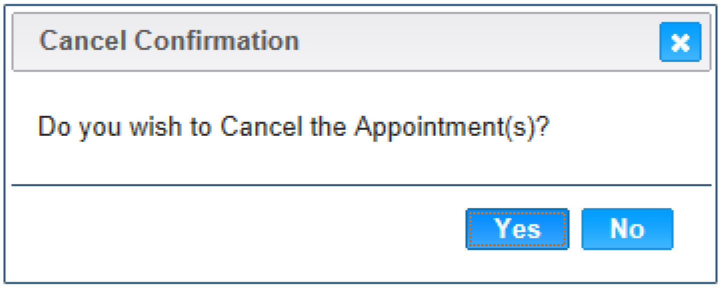


Figure 8.1: Cancel Confirmation

- **Yes** – Cancels the appointment.
- **No** – Closes the window and no action is taken.

Scheduled Group Nutrition Discussion Appointments:

- **Client ID** – Client ID for the scheduled appointment. This field is display only.
- **Name** – Name of the client. This field is display only.
- **DOB** – Date of birth of the client. This field is display only.
- **Cat** – Category of the client. This field is display only.
- **Edit** – Selection redirects user to the Edit window.

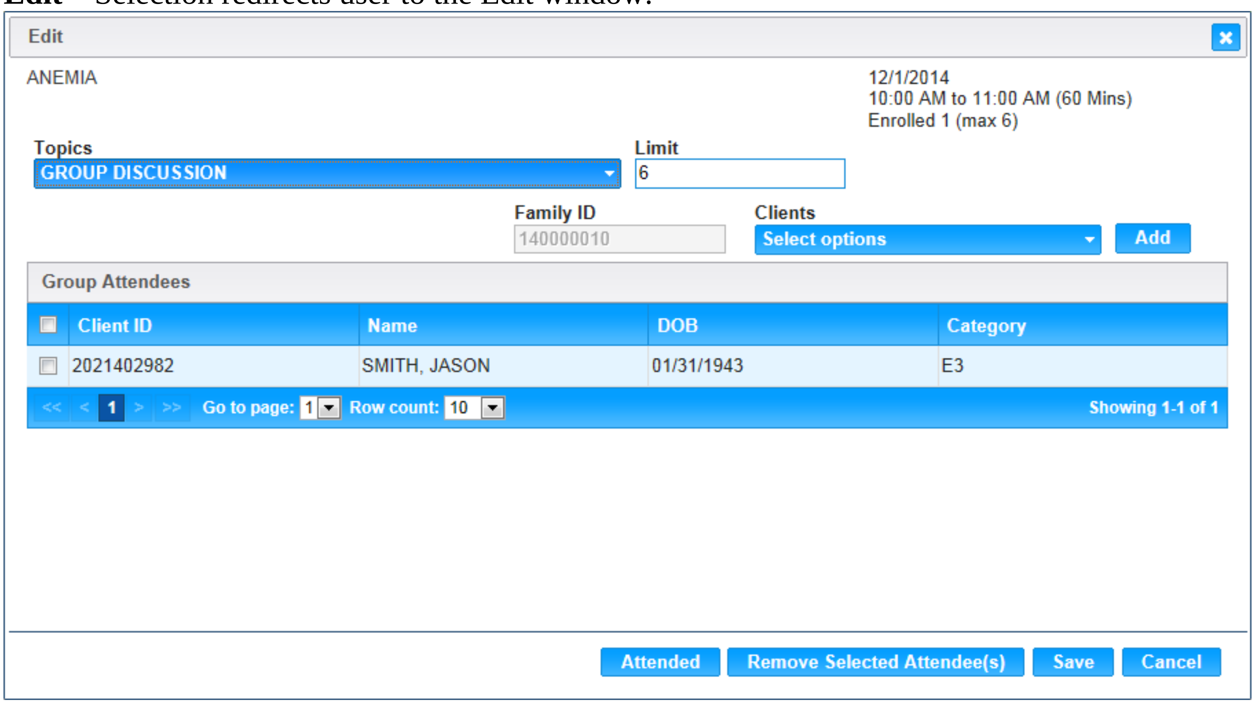


Figure 8.2: Edit Group Nutrition Discussion

- **Topics** – Multi-select drop down list of group topics.
- **Limit** – Max number of class attendees.
- **Family ID** – Family ID for client. This field is display only.
- **Clients** – Multi-select drop down list of clients in the family.
- **Add** – Selection adds client(s) to Group Attendees grid.
- **Client ID** – Client ID for scheduled appointment. This field is display only.
- **Name** – Name of the client. This field is display only.

    - **DOB** – Date of birth of the client. This field is display only.
    - **Category** – Category of the client. This field is display only.
    - **Attended** – Selection marks selected client(s) as having attended the group.
    - **Remove Selected Attendee(s)** – Selection will remove selected client(s).
    - **Save** – Initiates save of changes to the page.
    - **Cancel** – Closes the window and no changes are made.

Pending Services:

- **Clients** – Drop down list of clients in the family.
- **Services** – Drop down list populated with services.
- **Active** – Selection for searching active/not active pending services.
- **Go** – Initiates search for pending services.
- **Client Name** – Name of the client. This field is display only.
- **Category** – Category of the client. This field is display only.
- **Gender** – Gender of the client. This field is display only.
- **Service** – Service selected for the client. This field is display only.
- **Duration** – Length of time needed for the appointment. This field is display only.
- **Things to bring** – List of items the client needs to bring. This field is display only.
- **Date** – Date the pending service entry was created. This field is display only.
- **Status** – Y/N indicator if the pending service is active. This field is display only.
- **Schedule** – Redirects the user to the appointment availability search page to schedule an appointment for the pending service.
- **Add** – Selection will display window to add a pending service.

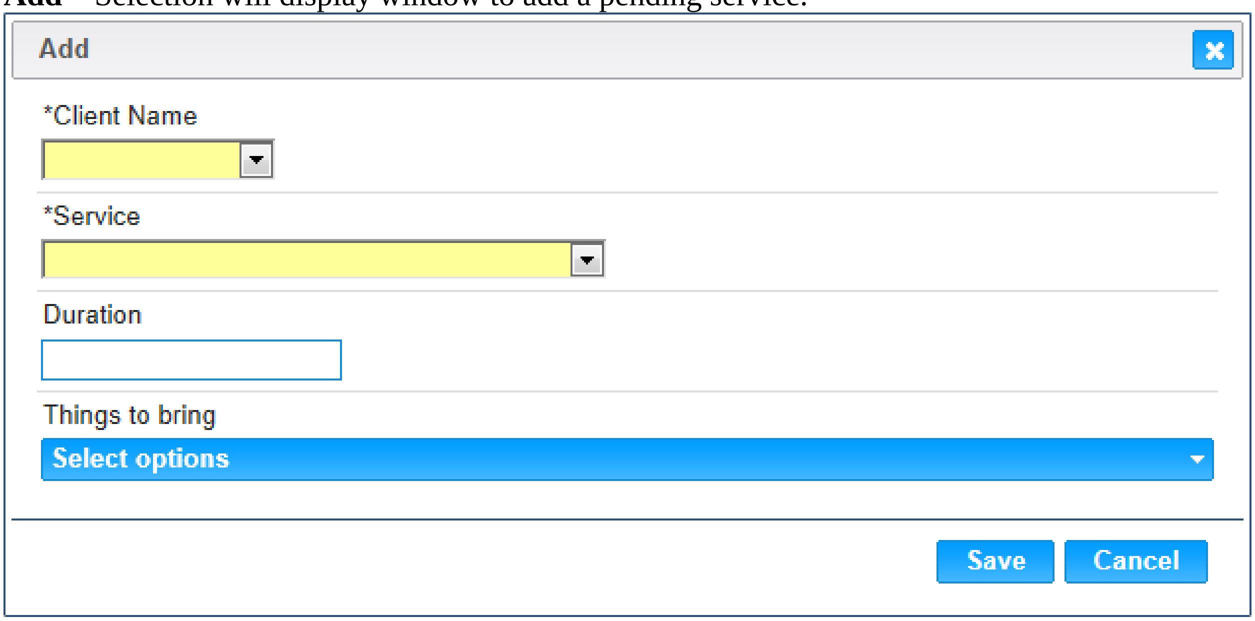


Figure 8.3: Add Pending Service

    - **Client Name** – Drop down list populated with clients within the family. This field is mandatory.
    - **Service** – Drop down list populated with types of services. This field is mandatory.
    - **Duration** – Numeric text field for the duration of the appointment.

    - **Things to bring –** Multi-select drop down list populated with items for the client to bring to the appointment.
    - **Save –** Initiates the save of the new pending service.
    - **Cancel –** Closes the window and no action is taken.

Appointment History (all fields are display only):

- **Client Name –** Name of client for the appointment.
- **Service/Group –** Service or Group name for the appointment.
- **Date –** Date of the appointment.
- **Time –** Time of the appointment.
- **Things to bring –** List of things to bring for the appointment.
- **Status –** Status of that appointment.
- **Walkin –** Y/N indicator if the appointment was a walk-in

Buttons:

- **Find Appointment Availability –** Redirects user to the Appointment Availability Search page.
- **Find Groups –** Redirects user to the Groups Availability Search page.

Calculation(s):

Background Processes:

9 NOTES PAGE

The Notes page is used to review or enter notes for clients in a family or enter a Staff Alert for the whole family.

Navigation Path: CSFP Services | Notes Page

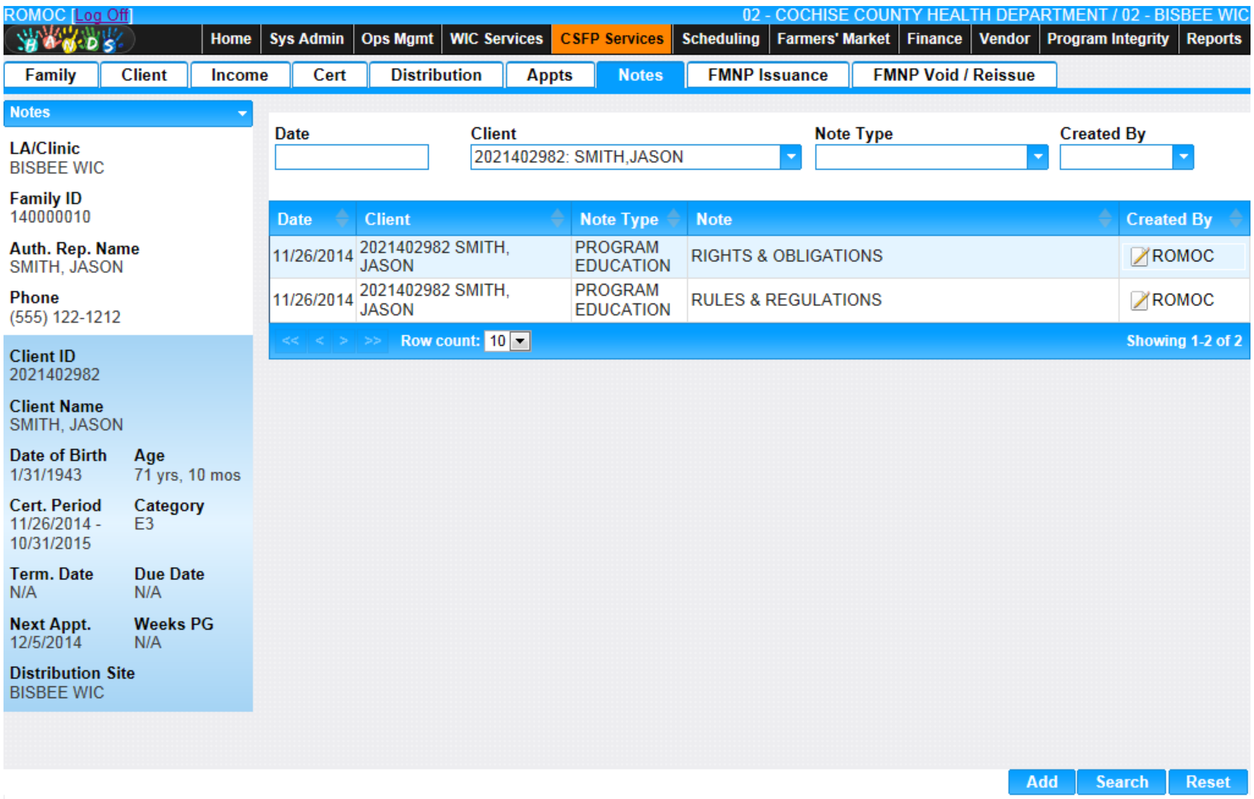


Figure 9: Notes page

Fields:

- **Date** – Calendar search field.
- **Client** – Drop down list populated with clients in the family.
- **Note Type** – Drop down list populated with note types.
- **Created By** – Drop down list populated with user names.

Notes Grid (all fields are display only):

- **Date** – Date the note was created.
- **Client** – Client ID and name for that note.
- **Note Type** – Note type for that note.
- **Note** – Text within the note.
- **Created By** – User name of who created that note.

Buttons:

- **Add** – Selection redirects user to the add note page.
- **Search** – Initiates a note search based upon the search criteria entered.
- **Reset** – Unsaved edits are cleared restoring the form to its previously unedited state.

Calculation(s): None

Background Processes: None

9.1 Add a Note

This page is used to add notes.

Navigation Path: CSFP Services | Notes Page | Add Button

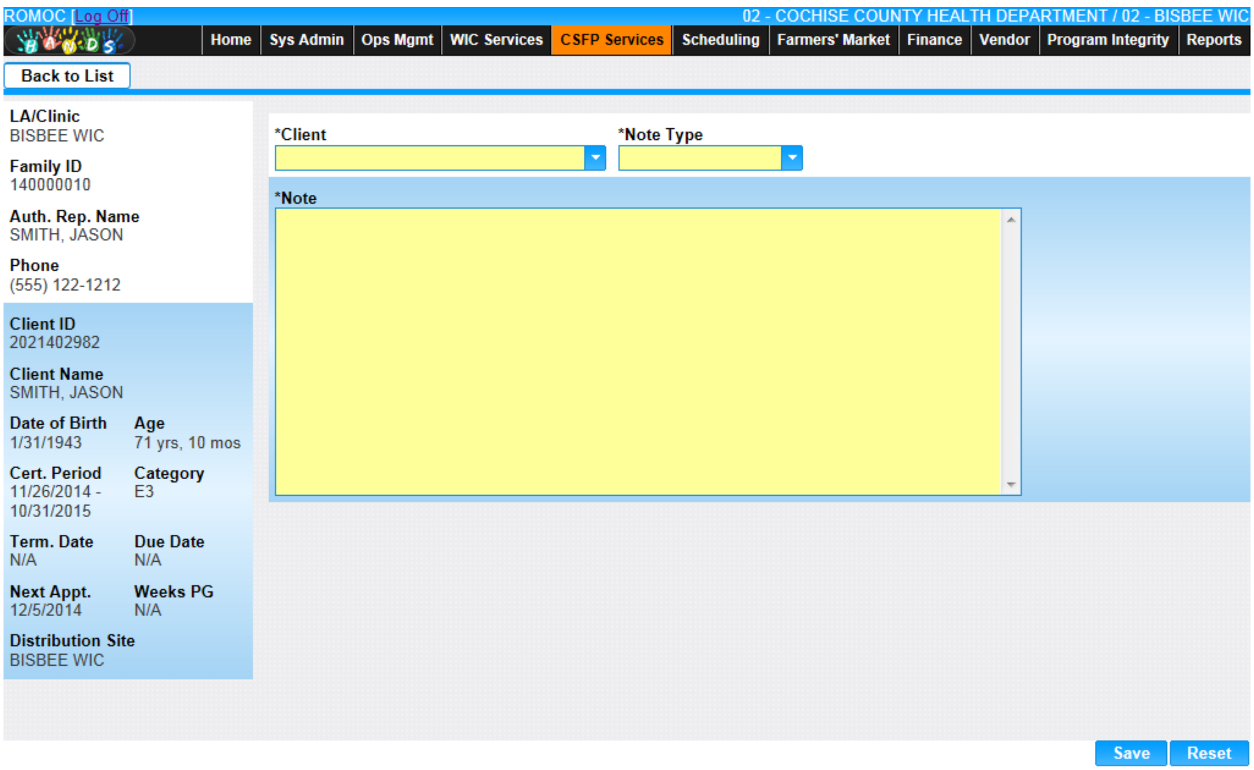


Figure 9.1: Add Notes page

Fields:

- **Client** – Drop down list populated with clients in the family. This field is mandatory.
- **Note Type** – Drop down list populated with note types. This field is mandatory.
- **Note** – Free text field for the note. This field is mandatory.

Buttons:

- **Save** – Initiates the save of the new note.
- **Reset** – Unsaved edits are cleared restoring the form to its previously unedited state.

9.2 Edit a Note

This page is used to edit or review notes. No edits can be done to the note unless it has a Note Type of "Staff Alert", then the Note Type can be updated.

Navigation Path: CSFP Services | Notes Page | Grid Edit Icon

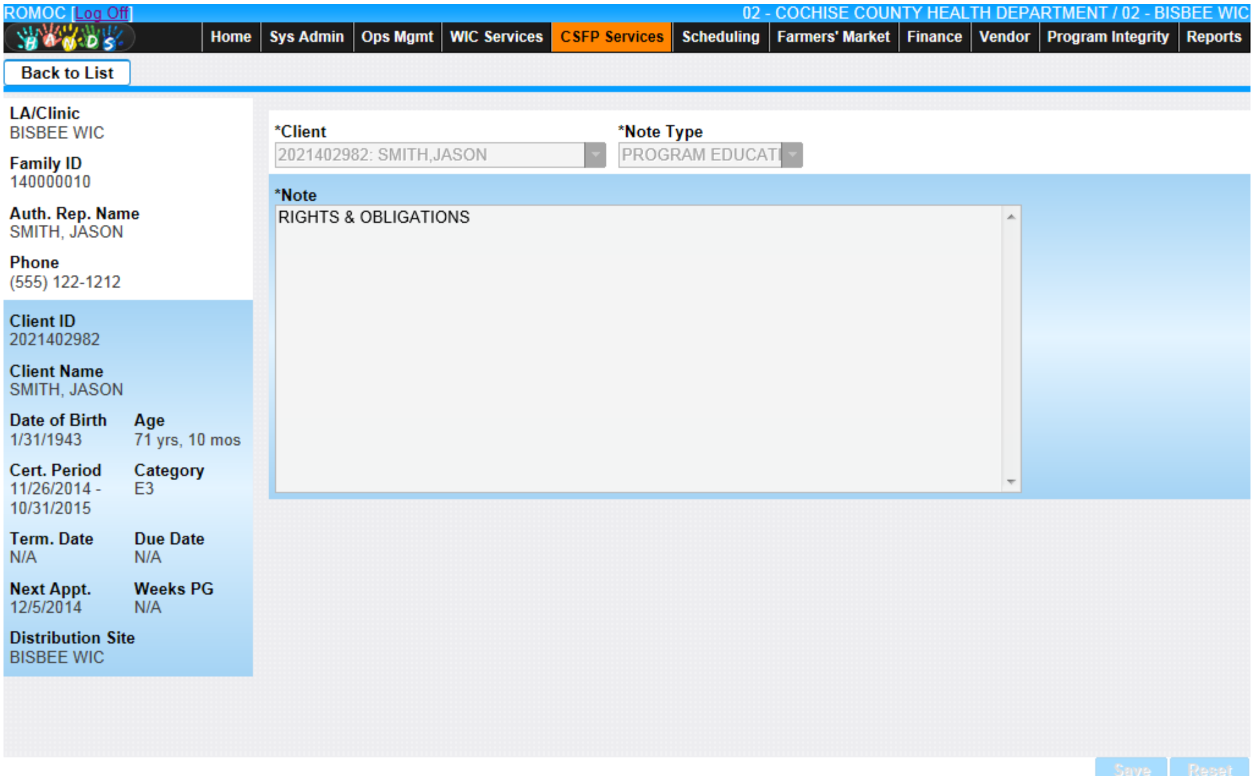


Figure 9.2: Edit Notes page

Fields:

- **Client –** Name of the client for the note. This field is read only.
- **Note Type –** Note type for the note. This field is read only.
- **Note** – Text of the note. This field is read only.

Buttons:

- **Save –** This button is disabled. No action can be taken.
- **Reset –** This button is disabled. No action can be taken.